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Appreciative Inquiry

Can it change the way we change?

Training strategy Corporate culture
Creativity **The learning process**
Cultural diversity Team roles

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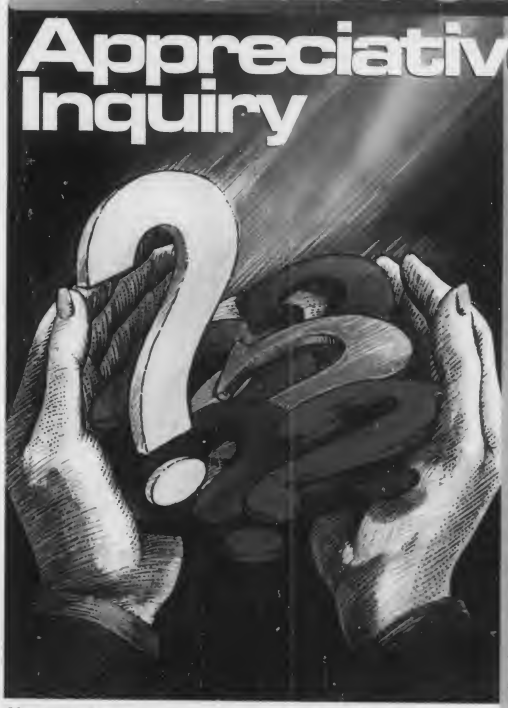

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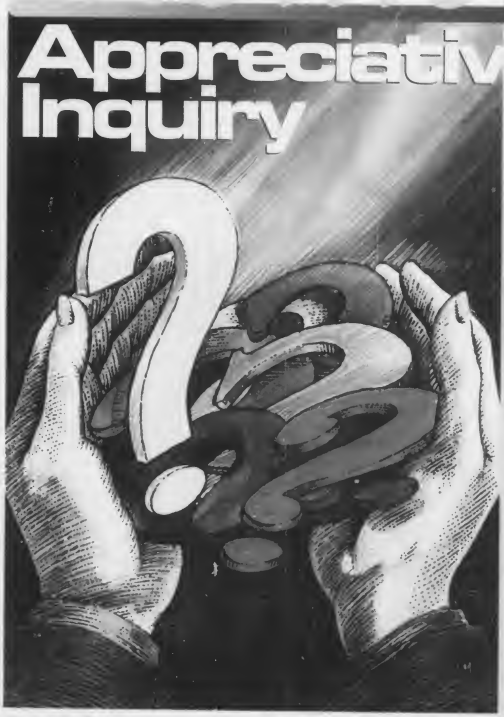

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Martin Delahoussaye
is the publisher and managing editor of Training Journal

Anything is possible

Appreciative Inquiry was on the conference workshop agenda along with the usual fare: training evaluation, performance management, team building and other recognisable topics. I hadn't come across the topic before, so I pencilled in the time on my daily planner (thoughtfully provided by the organisers) and went off in search of the next workshop on the menu. I attend a lot of training-related events, the majority of which discuss familiar and well-trodden issues. But conference-going is a good way to monitor the pulse of training and development, and the networking opportunities are excellent.

When I do encounter an unfamiliar subject on a conference programme, I always attend. Full of enthusiasm, I usually take my seat in the hope that the session turns out to be valuable and informative. However, experience has taught me to hang on to just a touch of cynicism since I have sat through too many sessions that advertised a 'radical and new approach' only to discover the event was built around the author's hardly earth-shattering new book. The AI session, I am pleased to say, was of the valuable and informative variety, with just one small toe in the 'author's new book' category.

The session was facilitated by Cathy Royal, an impressive and enthusiastic person whose boundless energy, and infectious and obvious passion for her subject would have brought to life even the most dour of topics. Suffice to say, when I left the workshop (with my obligatory copy of the her book, *Lessons From the Field* clasped in my hand, hence the 'one toe' comment earlier) I felt this was a topic that would interest many readers of *Training Journal*.

I read the book on the journey home and learned of a number of people who were actively involved in using the techniques of AI, Liz Mellish among them. I made the usual approach and in my initial discussion with Liz I discovered a) she was keen to write a feature article, and b) as she was in the midst of her PhD on AI, she was ideally placed to offer both a theoretical and practical perspective.

That's the story on how Appreciative Inquiry came to be this month's cover feature. What interests me about AI is that as a change model, it seems as applicable to social change on a grand scale as it is to organisational change. *Lessons From the Field* has a number of case studies on successful social change using Appreciative Inquiry. You will find details on this book and other references at the end of the Appreciative Inquiry article. And if you ever see Cathy Royal's name on a conference programme, don't miss her. I guarantee you will walk away believing anything is possible.

Sincerely,

Martin Delahoussaye
Publisher

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GOLDEN PAGE AWARD WINNER 1999
ANBAR

News

Recent **appointments, surveys, awards** and **conferences**

APPOINTMENT

The Industrial Society appoints new leader

Will Hutton

Will Hutton, Editor in Chief of *The Observer* and author of *The State We're In*, is to become the new Chief Executive of The Industrial Society. He will succeed the Society's current leader, Tony Morgan, who retires at the end of the year.

Hutton becomes the seventh leader of The Industrial Society, the UK's largest independent training and advisory body with over 10,000 Member organisations. Founded in 1918, the Society holds a Royal Charter and charitable status, and is governed by a council of leaders from business, unions and voluntary bodies.

Industrial Society Chairman Sir Christopher Wates, who heads the Wates Group construction and housing business, said the appointment of Will Hutton signalled the Society's determination to become the UK's leading campaigning force on workplace issues.

Will Hutton said: 'Becoming The Industrial Society's new Chief Executive is an immensely exciting challenge and I'm delighted to be joining the organisation. The Society has established a powerful reputation as consultants and trainers, and a bold and ambitious review of their future has now committed the organisation to becoming a major source of new thinking across the gamut of workplace issues. The Society's credibility with both sides of industry and with policy makers means it is superbly placed to make a real difference to life at work, but also by helping organisations make that future happen.'

For further information contact The Industrial Society at (tel) 0171 479 2000.

SURVEY

British companies fail to make it into the top 25

A survey by Hay Management Consultants has revealed that 'The World's Most Admired Companies', as ranked by Hay and *Fortune Magazine*, have a far greater focus than their competitors on developing leaders. With the only British company in the 1998 top 25 (British Airways) falling off the list, these findings should be compulsory reading for UK business.

The World's Most Advanced Companies were more confident in their ability to train their leaders than the companies who did not make the grade. Only 25 per cent of the most admired companies were uncomfortable with their leadership development programmes, compared with 50 per cent of their peer group. They are 26 per cent more likely to use planned career assignments, where an employee determines a particular task or placement, in order to equip himself/herself with a particular skill (for example, opting to spend six months in the strategy division to develop strategy skills). They also stress the importance of executive coaching of their executives, being 35 per cent more likely than their peer group to use one-to-one coaches to develop leadership potential.

The commitment of the most admired companies to developing leadership skills is reaping dividends not only in how others perceive them but also in how they perceive their own management. Some 91 per cent of the most admired companies were satisfied with the quality and breadth of their executive level leadership, compared with 72 per cent of the sample peer group. At a slightly lower level, 83 per cent of the most admired companies were satisfied with their senior management, compared with only 54 per cent of their peer group.

The annual ranking of 'The World's Most Admired Companies' was published in October by *Fortune Magazine*. The ranking is based on a survey of executives throughout industry, along with Wall Street analysts.

The top 25 were again dominated by US companies, with General Electric taking the number one spot, followed by Microsoft, Coca-Cola, Intel, Berkshire Hathaway and IBM. The highest rated British companies, none of whom made the top 25, were (in descending order) BP Amoco, Shell Group, Unilever, British Airways and Reuters Group. Other than these, Glaxo Wellcome, SmithKline Beecham, Reed Elsevier, United News and Media, Marks and Spencer, Reckitt and Coleman, and BT were the only British companies to make it into the lists of the top 12 companies in each industry sector.

For further information contact Hay Management Consultants at (tel) 0207 881 7502.

• CONFERENCE

Knowledge Management & Organisational Learning Conference

Linkage International in association with INSEAD and @Brint.com has announced the second annual Knowledge Management & Organisational Learning Conference: Developing and Leveraging Your Organisation's Human Capital, 28 February–2 March 2000 at the Royal Lancaster Hotel, London. This international forum will bring together over 300 experts, thought leaders and corporate practitioners in a community of practice that will help all Human Resource professionals learn the HOW of building organisational leading and knowledge management. Participants will come away with the knowledge, tools and contact network needed to lead their organisations' knowledge and learning strategy into the next millennium.
For further information contact Isabel Lamacraft at (tel) 0181 977 9277.

• AWARDS

Fenman's MD Hugh Murray (left) with David Simmonds

Fenman honours top author

David Simmonds, author of *The Evaluation Toolkit*, has received Fenman's annual award for best-selling title.

'David's loose-leaf trainer's manual, *The Evaluation Toolkit*, has touched a nerve with trainers everywhere,' says sales and marketing manager, Debbie Carter. 'It provides a thoroughly practical set of over 70 tools to measure the effectiveness of training and learning – and that's just what trainers are looking for.'

David spent the morning touring the Fenman offices and talking with members of the Fenman team, before being presented with his award. Previous winners have been Tony Bray for *Continuous Improvement* and Eddie Davies for *Unlocking Your People's Potential*. Both authors have gone on to write many more successful Fenman titles and David already has another Fenman title in the pipeline.
For further information contact Debbie Carter at (tel) 01353 665533.

• SURVEY

Instant access is key driver for growth in intranet-delivered training

The advantage of quick and easy access to training is encouraging more organisations to run interactive learning courses over their corporate intranet, claims a new survey that highlights management skills as the fastest-growing online skill set.

The annual survey, 'The Future of Online Learning 1999' by Xebec McGraw-Hill, a multimedia training company, questioned 249 HR and IT professionals from a cross-section of UK organisations. It found that over three-quarters (77 per cent) plan to make the intranet a key platform for delivering training over the next three years.

The research shows that 78 per cent of organisations now have a corporate intranet and 23 per cent are using it to deliver online training. Of these, 73 per cent are currently delivering IT/technical skills, with 39 per cent delivering corporate training; 23 per cent finance skills; 20 per cent management skills (leadership, coaching, appraisals); 20 per cent personal skills (presentation skills, time management and assertiveness); 16 per cent customer care training (telephone skills, handling complaints); 9 per cent sales and marketing training and 7 per cent total quality management training.

Over the next three years, 43 per cent of organisations are planning to deliver management skills training over their intranets, followed by personal skills (25 per cent); corporate training (20 per cent); finance skills (19 per cent); IT/technical skills (19 per cent); customer care (16 per cent); sales and marketing (14 per cent); TQM (12 per cent) and languages (11 per cent).

'The data suggests that relatively high numbers of UK employees are already accessing training over the intranet on a regular basis,' says Michael Smith, Managing Director of Xebec McGraw-Hill. 'It also reveals an interesting shift in the type of training that will be delivered over intranets in the future. The priorities for online learning look set to become the same as those for traditional corporate training.'

The key driver for using intranets to deliver training, cited by 83 per cent of respondents, is to make training more accessible. The other perceived advantages are that it allows people to learn at their own pace and it enables organisations to provide consistent training across many sites. Some 60 per cent of respondents say intranet-based training will help their organisation develop a learning culture, leading to 'just-in-time' training that is efficient and cost effective.

According to the survey, organisations will have to overcome barriers if they are to make a success of online learning. These include helping people deal effectively with interruptions when they are training at their desktop, and providing technical and senior management support. There is also a perception that company intranets may have difficulties in coping with the extra 'traffic' of running online training courses.
For a free summary of 'The Future of Online Learning 1999' contact Xebec McGraw-Hill at (tel) 0800 585889 or visit (website) www.xebec-online.com

liP Conference MC Jon Snow (ITN Channel 4 News)

liP announces 1999 award winners

Investors in People UK has announced the winners of its 1999 liP awards. In a series of simultaneous one-day conferences held in London, Cardiff, Leeds, Glasgow and Belfast linked via satellite, liP delegates celebrated outstanding achievements and honoured the following organisations and individuals:

TNT Express Services for OUTSTANDING PRACTICE
Richmond Frozen Confectionery for INNOVATIVE PRACTICE
Chris McEwen, managing director of Tendring Construction in Essextor KEY CRUSADER
Major Steven Chambers of the Eighth Infantry Brigade in Northern Ireland for KEY CHAMPION
Humberside Training and Enterprise Council for OUTSTANDING PARTNER.

Over the course of the conference, delegates were informed of the changes to the liP Standard, which come into force on 1 April 2000. Ruth Spellman, Chief Executive of Investors in People UK revealed that changes to the process of accreditation were being made after lengthy consultations with all those who have an interest in the Standard. Responding to concerns within business that the Standard placed an over-emphasis on the Portfolio of Evidence (the mandatory paper trail that proves all aspects of the Standard had been met) liP will simplify the process. This includes a reduction in the number of key indicators and a promised 24 hour turnaround for feedback and assessment decisions.

liP estimates that the changes will save three or four weeks in managerial time, which will, in turn, reduce the overall cost of achieving the Standard. Other changes to the Standard will be the mandatory inclusion of all employees in the organisation and the introduction of a range of voluntary indicators such as recruitment and selection.

To measure the business impact of the Standard since its introduction eight years ago, liP commissioned a study *Building Capability in the 21st Century*. Co-author Professor Amin Rajan treated delegates to a summary of the study, which identified over 40 benefits associated with the Standard. These are grouped under four main headings: Raising the Bottom Line, Building New Relationships, Reducing Hassle and Creating New Mindsets.

For further information on the study and for details of the Investors in People Standard contact Investors in People UK at (tel) 0207 467 1900; or visit (website) www.iipuk.co.uk

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PROVEN TO WORK

Diary dates

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Date & Venue	Event	Contact
10–11 November Birmingham	The National Project Management Exhibition	Imark Communications Tel 07000 763 896; Website www.softworld.com/npme
11–12 November Worthing	Managing Change and New Technology	mss axiom Tel 01903 266675; Email axiom-mss@orangenet.co.uk
22–23 November London	The Essential Guide to Managing Your Call Centre	Russell Bacon Tel 0171 915 5369; Fax 0171 915 5392
24 November Birmingham	TECHTraining99	Institute of Personnel & Development Tel 0121 704 2784; Fax 0121 711 3153
30 November West Sussex	Strategic Human Resources in Practice Seminar	Pauline Hinds Tel 01293 851644; Email pauline.hinds@roffey-park.co.uk
30 November St Neots	Making Management Communication Work Seminar	Moya Winter Tel 07071 222629
6–10 December London	The New Trainer	Fielden-Cegos Ltd, The Towers, Towers Business Park, Wilmslow Road, Didsbury, Manchester M20 2FZ Tel 0161 445 2426; Fax 0161 446 2051; Website www.fielden-cegos.co.uk
7 December London	**Sales Training: latest developments**	**Sales Training Association, 17 Playses Green, Hambridge, Langport, Somerset TA10 0AP Tel/Fax 01460 281600**
7–8 December London	Time Management	Tamantha Downes Tel 0207 881 1831; Fax 0207 730 4293; Email tamantha@hawksmere.co.uk
16–17 December Worthing	Effective Communication	mss axiom Tel 01903 266675; Email axiom-mss@orangenet.co.uk

For training cartoons contact Mike Flanagan at (tel) 01256 703004

Assume it's the circumstances, not the person

We all know people in the workplace who we think are awkward, difficult … a problem. But, as **Peter Honey** suggests, rather than blame the person one solution is to assume such behaviour is triggered and reinforced by situational factors.

Lately, I've been running workshops on solving people problems. It is a topic which, for obvious reasons, seems to grab everyone. We hear about people who fail to meet deadlines, resist change, rub others up the wrong way, procrastinate, blame, go absent too often, are poor timekeepers, make mistakes, bully, are defensive, won't let go, interfere, are too pedantic, are too reticent, are too bombastic, lose things, nag, are too cautious … Need I go on?

And it's not just current problems. Past difficulties are vividly recalled with kids, partners, colleagues, doctors, shop assistants, estate agents and, I'm sorry to say, especially with bosses. People's managers come top of the list because they inevitably have such a profound effect, for better or worse, on people's lives while at work.

Why, even though it is a long time since I had a proper boss, I remember some of my own difficulties. I once worked for a manager who hid me and tiptoed to meetings with more senior people that I should have known about and attended. Another manager used to rewrite everything I produced; another never gave me any feedback – even if I asked for it; yet another used to keep me talking (*he* did the talking!) long after the time I should have left for home .. and so on – none of these life threatening but all irksome problems that I suffered at the hands of various bosses.

One of the case studies about a boss (naturally they are all drawn from real life) that I use on the workshops goes like this …

Ian is CEO of a manufacturing company and has eight direct reports. He believes people work best under pressure, so he interferes a great deal. As soon as he suspects a deficiency, mistake, problem or cover-up, he pounces and initiates an inquisition to 'flush out the truth'. He uses an aggressive, challenging style. These sessions go on until Ian is satisfied he has got to the bottom of things and fixed the problem. Ian's autocratic style is causing some worrying consequences. Managers spend unproductive time grumbling about him and trying to anticipate his next move. They are also ultra cautious, checking and double checking everything so that he can't catch them out. They are inclined to delegate less and less, to be quick to blame, to firefight and forego any forward planning.

How could the managers who report to Ian modify the situation?

In order of popularity people suggest actions such as confronting Ian and leaving him in no doubt that his management style is having a detrimental effect on performance, persuading him to trust his direct reports more, escalating the problem to Ian's seniors and, of course, jumping ship and finding another job! I always maintain that, while the latter is an option, it is an admission of defeat.

Now the fascinating thing about these suggestions is the touching faith they display in the effectiveness of telling people to change. The 'telling' can take many forms from submissive innuendoes, to assertive feedback/persuasion, to aggressive nagging. However it is done, the assumption is that if you tell someone to change they will change on demand. And this, despite people readily admitting that, in their experience, the effects of telling have been patchy and/or temporary with only the occasional triumph!

So why are people problems, particularly recurring ones, so resistant to feedback and persuasion? I'm convinced it is because telling someone to change leaves the onus with them. It gives us the illusion that we have transferred ownership of the problem, together with responsibility for fixing it, to them. We've done our bit, it's up to them to mend their ways and if (when?) they don't … well, that's their fault.

Peter Honey BA (Psych), D Litt, Dip Ed, FIMC, FIPD, is a chartered psychologist and management consultant
He can be contacted at (tel) 01628 633946, (fax) 01628 633262, (email) peterhoney@peterhoney.co.uk or visit (website) www.peterhoney.co.uk

The approach I advocate makes quite different assumptions. First, it assumes that when people behave in ways that exasperate us, that's our problem not theirs. Second, it assumes that people's behaviour is caused more by the circumstances they are in than by them. To be more precise, the approach assumes that problem behaviours are always triggered and reinforced by situational factors. The triggers can be someone else's behaviour (often our own, of course!), the time, the place, the weather, the phone ringing, the photocopier jamming – *anything* that happens before the behaviour in question.

The reinforcers are the pay-offs the person enjoys as a consequence of their behaviour. They could be someone apologising, helping, sympathising, paying attention or something going better than it did before. People behave anticipating that, on the majority of occasions, it will work for them and improve the situation.

The key to solving the problem, therefore, is to assume the situation, not the person, 'causes' the problem behaviour to occur again and again in similar circumstances. Even if this assumption is wrong, and it *is* the person not the situation, no harm is done. It is far more practical and less dangerous to meddle with a situation than to meddle with a person. It is also much easier to involve the 'problem' person in analysing their circumstances in a non-threatening, non-accusational way.

So, how could Ian's behaviour be improved? By taking substantial problems to him early on (*before* he becomes suspicious), together with some solutions, and asking for his advice on which would provide the most promising way forward. This is likely to trigger helpful, reasonable behaviour from Ian. The pay-offs for him are that he is kept better informed and has early warning of problems in the pipeline. He also retains some involvement in the action and, hopefully, can see that solutions to problems are sounder than was previously the case.

When gardening, the answer lies in the soil. When solving people problems, the answer lies in the situation.

Books

This month's new titles cover the varied topics of **management theory, 'chaos' theory, skills and training** and **internal communication methods**.

The Shopfloor Man: A Watershed in Management Theory

Peter Sinclair
Management Books 2000 Ltd, Cowcombe House, Cowcombe Hill, Chalford, Gloucester GL6 8HP
Tel: 01285 760722
Website: www.mb2000.com
ISBN 1 8525 2298 4
Paperback £12.99

A handy little story book in short well-presented, readable chapters with catchy titles, describing how a prodigal son, on his second return, throws out the relatives and turns around a Scottish family's specialist engineering business over a two-year period. It is about change and empowering the workforce, with a view to getting them on board, hence the title. This self-assured writer, who, as you will have gathered, is very much in charge of the process, is not an advocate of the officers' mess, is frank in his approach and appears to take no prisoners.

A few more **hysterics** in organisations wouldn't go a miss. Perhaps a bit of **bedtime reading** for a trainer with **a sense of humour?**

Apparently, industrialists are flocking to see this classic transformation. It starts with a cavalier criticism with which some readers may well agree: that management books, in order to sell, elaborate a few basic ideas to excess. The author makes the plea that they should instead distil a few bullet points leading to a core message that is perhaps translatable to each unique local context, indeed a noble statement.

Having demolished management books the writer, in the same way, is dismissive of his own internal trainer and the contribution of management consultants generally. Surprisingly, he does acknowledges some writers on management, including Charles Handy (who also writes a good story), mentions TQM and agrees the use of Belbin's team roles as valuable as part of his approach in motivating his workforce. These he describes affectionately as 'an oddball collection of highly skilled machinists complete with foibles'. Sinclair elaborates on his organisational transformation and his own theory through 148 pages with one core message: 'bubbles'. These are not the type that spring instantly to mind but 'bubbles of personal and operational concerns that make up the daily round of each employee'. As their bubbles grow, the individual rises, eventually maybe to the top, out and beyond.

This is personal development through an organisational change model. The bubble idea is, to Sinclair's credit, certainly translatable to yours and my local context, and this the author offers to his own heroes and villains. He usefully gives a situation report at the end on his work chums, most of whom he feels have benefited from the process.

'Bubbles' is a very interesting and visual idea and may, in my view, result in hysterics for a trainer presenting it as part of a session. We certainly all need personal development; it needs a push – and anyway, a few more hysterics in organisations wouldn't go a miss. Perhaps a bit of bedtime reading for a trainer with a sense of humour? ***SF***

Ratings		*Clarity*	★★★★
Innovation	★★	*Usability*	★★
Readability	★★★★	*Value*	★★

Your reviewers ...

Stuart Farrer *is a personal and organisational development consultant. He can be contacted at (tel) 01225 482785 or (email) 114407.1475@compuserve.com*

Steve Holman *is Principal Lecturer, Head of Management Section at St Martin's College, Lancaster. He can be contacted at (tel) 01524 384672 or (email) s.holman@ucsm.ac.uk*

The Confederation of British Industry: Skills and Training Handbook

Stephen Hoare and Adam Jolly (consultant editors)

Kogan Page Ltd. 120 Pentonville Road, London N1 9JN

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Paperback £30

This directory gives an easy reference to training providers in the UK. Certainly, those organisations not listed have missed a promotion opportunity and definitively those that *are* listed are key players in their fields.

Part 7 of this A5 paperback book is the actual directory, which consists of a list of training courses/consultancies by category, industrial sector, specialism and other classifications, moving into educational establishments and other bodies, the role of Training and Enterprise Councils (soon to be abolished under a recent government proposal) and the college sector.

> This book provides much **essential foundation information** at a glance

This whole area is often a minefield of change and all reference contact points are of use to those company representatives responsible for the provision of training and development in their organisation. This book provides much of that essential foundation information at a glance with addresses, telephone numbers, fax and email contact points. Perhaps most useful are the actual names of individuals in these wide and various organisations, which may help to personalise any enquiry and build that all-important network of knowledge that modern executives need in order to survive.

descriptors. It is not comprehensive, but it is a foundation starting point for reference and search that any training manager or organisation may readily and easily utilise.

The earlier parts of the book discuss the roles of other players in the field, including qualification and curriculum

A useful text to have on your bookshelf. ***SH***

Ratings			
Innovation	★★★	*Clarity*	★★★
Readability	★★★	*Value*	★★★
		Usability	★★★

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amazon UK's top 20 business and finance bestsellers

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Boxtree *Paperback*

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3 **Accidental Empires** Cringely, RX
Penguin Books *Paperback*

4 **Trading Online: A Step-By-Step Guide To Cyberprofits** Patel, AB
Pitman Publishing *Paperback*

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Penguin Books *Hardcover*

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Kaplan, RS, And Norton, DP
Harvard Business School Press *Hardcover*

7 **Management Challenges For The 21st Century** Drucker, PF
Butterworth-Heinemann *Hardback*

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Addison Wesley Publishing Company *Paperback*

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Simon & Schuster *Hardback*

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Ellis, J, And Korper, S
Academic Press Inc *Hardback*

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Capstone Publishing Limited *Paperback*

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Christensen, CM
Harvard Business School Press *Hardback*

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Downes, L, Mui, C, And Negroponte, N
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Harpercollins *Paperback*

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Organize with CHAOS

Robin Rowley and Joseph Roevens

Management Books 2000 Ltd.
Cowcombe House,
Cowcombe Hill,
Chalford, Gloucester GL6 8HP
Tel 01285 760722
Website www.mb2000.com
ISBN 1 8525 2297 6
Paperback £12.99

This handy publication is a super read for those who wish to acquaint themselves with modern 'chaos' theory and how to put it into practice in their organisations. It seems strange to want to put chaos into an organisation, but the subject covered in the book is actually how to manage in a volatile and changing world.

There is a recognition that the conventional wisdom and established theory and practice may not be able to cope with the demands of the brave new world. (Echoes here of Huxley's futuristic nightmares and the parallel debate about their credibility and reliability.)

The authors argue that current strategies on motivation and leadership are either obsolete or only half right for the purpose of dealing effectively with increasingly chaotic global conditions. Hence they offer a fresh approach based on the principals of 'chaos' theory – previously thought of as an obstacle, but now recognised as a vital energiser for innovation, performance and sustained profit.

It is for each individual reader to accept or reject the sweeping nature of these claims; either way, the book charges the imagination sufficiently to warrant a few moments of consideration. The book comprises five parts:

- Part 1 – Chaos is the rule, not the exception
- Part 2 – Love change (as much as you used to hate it)
- Part 3 – Reward like shareholders; manage like customers
- Part 4 – Change tools which resonate, not cut
- Part 5 – How will this affect your job?

These parts are broken down broadly into two sections each, which then explain and grow the concepts.

The book is bursting with examples and quotes – albeit often the reader has no idea who is making the quote! However, that does not detract from them and their relevance. I particularly like the Bill Gates example (page 130), referring to the opportunities of the Internet and the 'Reward honest turkeys' paragraph with reference to NASA.

The layout, emphasis, summaries and bullet points are a bonus to the reader, and the logic and common sense of the discussion are encouraging. Whether the book and its contents would hold up against empirical research is another issue. Factually, it does not matter because its aim is to generate a creative approach to the management of change in a chaotic world. The easy-to-read style and diagrams support the text, and there is an index and reference section at the rear following the Conclusions and Appendices.

There is a place for this text on every book case and managers who are determined self-developers will devour its contents. ***SH***

Ratings		*Clarity*	★★★
Innovation	★★★	*Usability*	★★★
Readability	★★★	*Value*	★★★

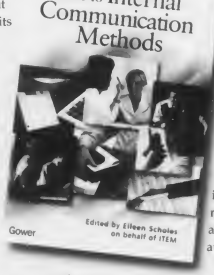
Guide to Internal Communication Methods

Edited by Eileen Scholes

Gower. 1999. Gower House, Croft Road, Aldershot, Hampshire GU11 3HR
Tel 01252 331551 Website www.gowerpub.com
ISBN 0 5660 8217 9
Paperback £25

This 168 page book is a comprehensive guide to modern communication techniques. The guide is innovative in its field and comprehensively fills a gap in the area, although it is overpriced at £25. (However, it could be argued that the text could save hundreds of pounds if utilised, so on that basis the price is relative.)

Managers are now faced with a wide choice of media which they can use to convey their messages. But where do electronic techniques fit in? What are the benefits of video conferencing? How are focus groups used? All these and many more communication techniques are discussed and clarified in the book.



Without doubt it is a fabulous resource, and provides both information and advice across the entire range of available methods. The guide will help practising managers to plan and manage their communication processes to achieve the aims of the organisation. Choosing the correct communication strategy in a fast, modern, world demands a knowledge that this book will help to provide.

The guide has a simple contents section and index. Each of the subject areas are broken down into sections giving strengths, weaknesses, budget issues and other headings in a consistent manner, making it easy to compare across the methodologies available.

This reference guide is a welcome edition for all management decision makers. ***SH***

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Illustration by Mike Edwards

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In-quire' (kwir), v., 1. The act of exploration and discovery. 2. To ask questions; to be open to seeing new potentials and possibilities. Synonyms: DISCOVERY, SEARCH and SYSTEMATIC EXPLORATION, STUDY.

Appreciative Inquiry

What is Appreciative Inquiry? And how can it be adapted to fit your own environment? **Liz Mellish** guides us through the AI approach, which can result in participants influencing and determining their own preferred futures.

As organisations have evolved from the centralised functional hierarchies of the 1970s, through decentralised business units of the 1980s, to matrix structures of the early 1990s to increasingly networked and 'starburst' arrangements for the new millennium, participants have experienced unprecedented turbulence and turmoil. The triggers for these changes aren't hard to identify: increased competition, global operating environments, technology enablers and emphases on core competence, partnerships and customer service.

The context for the application of OD approaches has changed to a more turbulent and impermanent environment. While there is still reliance on OD basics, considerable attention is being given to new concepts, interventions and areas of application. This second generation OD includes interest in organisational transformation, organisational culture, the learning organisation, teams and their various configurations, total quality management, visioning, and 'getting the whole system on the room'.

Figure 1:
4D model of Appreciative Inquiry

Training leaders and managers are chartered with the responsibility of building adaptive and co-operative capability within, across and beyond traditional functions towards networked, cross-functional, just-in-time team arrangements to get work done. While corporate rhetoric about new directions, compelling visions, common values and improved operating systems is relentless, the hearts and minds of participants in change processes frequently remain unengaged, non-committed and, at best, compliant.

Managing change from the participants' perspective so as to reconnect people to organisational strategy, to recapture their imaginations, to respect their contributions, and to energise and sustain the process demands a new philosophy, an innovative and inclusive approach to change.

One of the challenges, as an OD practitioner, is to take the best of the past into the future and to encourage clients to do the same when overwhelming feelings of hopelessness, 'change for change sake', fatigue, cynicism and so on set in. Most OD professionals will have worked with multiple intervention processes in order to sharpen strategic focus, and to build individual, group and organisational capability.

The underlying assumption, which has spawned many of our OD intervention processes (such as gap analysis, SWOT, benchmarking, performance indicators, process re-engineering), is that organisations are problems to be solved. Language to describe deficient and inadequate performance

has evolved to define these 'problems' (see Table 1). The need to reinvent or regenerate OD is clear. The choices appear to be:

- to stay in the incremental problem-based, diagnosis/treatment frame, or
- to move on to a fresh perspective which simultaneously addresses the compelling triad of strategy, structure and culture in change.

Appreciative inquiry provides the OD practitioner not only with an approach to change, but also with an opportunity to fundamentally reframe one's philosophical stance – that is, to be deliberately hopeful, to work with optimism, to create opportunity, and to celebrate the human spirit in change.

Appreciative Inquiry: what is it?

Appreciative Inquiry (AI) is an approach to organisational development and change that grows out of social constructionist thought. The AI approach offers us all the process and potential to positively explore, collectively imagine, collaboratively design and jointly commit to a path forward.

Assumptions of AI include the following.

- In every society, organisation or group something works.
- What we focus on becomes our reality.
- Reality is created in the moment, and there are multiple realities.
- The act of asking questions of an organisation or group influences the group in some way.
- People have more confidence and comfort to journey to the future (the unknown) when they carry forward parts of the past (the known).
- If we carry parts of the past forward, they should be what is best about the past.
- It is important to value differences.
- The language we use creates our reality.

Principles of AI

The principles of AI are as follows.

- Appreciate: the best of what exists, hopes for the future.
- Apply: knowledge of what works and what's possible.
- Provoke: imaginations regarding new ways of organising, creative improvements.
- Collaborate: collective capacity building, expertise and resources.

4D model of AI

The 4D model of AI (see Figure 1) is infinitely transferable to any context – for example:

Table 1: Language to describe deficient and inadequate performance

Vocabularies of organisational deficit	Vocabularies of human deficit
Organisational stress	Depressed
Theory X	Mid-life crisis
Job dissatisfaction	Extremely controlled
Work alienation	Bulimic
Turfism	Kleptomaniac
Neurotic organisation	Obsessive-compulsive
Authoritarian management	Anti-social personality
Low morale	Neurotic
Executive burnout	Low self-esteem
Role conflict	Paranoid
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Peter principle	Psychopathic co-dependent
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Bureaucratic red tape	Dysfunctional family
Labour management mistrust	Brief psychotherapy
Interpersonal incompetence	
Organisational diagnosis	

NB: all these terms have come into common usage only within the current century (several only in the last two decades).

- individuals reflecting on their career directions
- an OD consultant working through a brief with a client
- a group needing to frame up and agree their team approach
- different groups needing to establish co-operative arrangements
- an organisation considering strategic shifts
- an organisation attempting to manage a merger
- a researcher designing a data collection method/focus groups and the like
- community consultations – for example, involvement in town planning and infrastructure development, decisions about sustainable development.

So how does AI work?

As we work with the approach, we discover that AI is a philosophy, a way of life. One assumes the position of being the detective for 'good things'. One develops what we call an 'appreciative ear'. One purposefully searches for and accentuates the positive. Simple really.

We know that high achievers apply the 'two for one' rule. They generate two positive thoughts for every negative thought. They choose to respond pro-actively and purposefully to setbacks; they ➤

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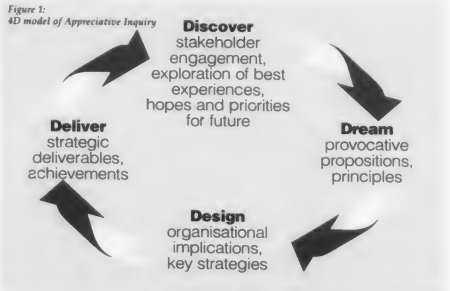

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Table 2: Example of an Appreciative Inquiry protocol

- **Question 1**
  Reflecting on your experience to date, what have been the high points? (Select an example of when you felt you were making a real difference. What were the circumstances? Why did it feel good? Who were you working with? What did you/your client achieve? What was special about this experience? Describe the story around your example ...)
- **Question 2**
  What is it that you value most about yourself, your distinctive competence, your colleagues, your clients/organisation?
- **Question 3**
  What 'gives life' to without it (this core life-giving factor), the organisation would cease to exist?
- **Question 4**
  What are your hopes for your organisation? (What best might it represent? What might it achieve?)
- **Question 5**
  What key success factors would indicate to you that ... is well positioned?

learn and improve. We also know that people respond to attention (placebo principle) and to positive expectations (pygmalion effect).

We all have difficulties. However, it is our line of inquiry, our capacity to unearth what is helpful, our willingness to discover what we care about and what will sustain us in the future that counts.

The AI process therefore commences with context and topic. The client, the team or the organisation may request assistance with, for example, supporting a structural reconfiguration, developing a strategic plan, aligning service strategy to client demand, engaging the community in government decision making and resource allocation, facilitating a hostile group of stakeholders, changing a culture, developing partnering competence and building a team.

Create the questions to explore the topic

Based on the assumption that something works, people care enough to have raised the issue, start thinking about the questions you might ask. For example, questions might include: 'What have we got to build on?', 'What works best around here?', 'Can you describe a time when you think the team/organisation performed really well?', 'What were the circumstances during that time?', 'When are you most proud to be associated with the team/organisation?', 'What's the best possible outcome for you, how best may organisational strengths be employed?', 'Who will be impacted by change in/out of the organisation; who needs to be engaged to make it work?'

These questions help to frame the intent of the AI and provide a framework for creating questions to facilitate participants' positive engagement in the change process.

Designing an Inquiry protocol

A wide range of options exists when it comes to designing an Inquiry protocol that suits the context and required outcomes. These include whole system interventions (100–1,000 participants) to small-group situations, spread over single episodes or longer-term phased interventions. The AI protocol is the starting point of the 'Discovery' phase ('the best of what is', see Figure 1). Useful guidelines for framing the AI protocol include having five questions relating to the topic and designed to reflect best experiences, values, life-giving force, hopes and priorities (see Table 2). This enables participants to take the best of the past (known) into the future (unknown) and provides rich experiential and contextual data from which to identify binding themes and to collectively imagine new and exciting possibilities.

Irrespective of the size of the group, commencing the process with paired interviews is valuable. Participants are encouraged to share stories, examples and hopes with their partner. After the interview, they remain with their partner and form small groups with three or four other pairs. Each person reflects and shares their partner's information with the small group. Together, the group identifies binding topics, compelling themes and core values with which they want to move forward.

Again, there are options with regard to the collation and sharing of data which emerges from the 'Discovery' phase (see Figure 1). A small group may be requested to develop a new vision relative to the topic of the inquiry or the entire group may (with facilitator support) extract themes and topics that are used to inform the second of the 4D phases, 'Dream' (see Figure 1) and the development of provocative propositions.

Provocative propositions

During the 'Dream' phase ('imagining what might be'), participants are asked to envision results and engage in future search. Information from the 'Discover' phase is used as a platform to speculate on possible and desired futures for the organisation, system or team. Participants may self-select, depending on their interest and expertise, key themes which they transform into statements of strategic and social intent – that is, positive propositions that excite them, stretch them and guide them towards a preferred future. The beauty in this process lies in the connections people see and express in where they want to go taking what they really value with them.

The process provides people with the opportunity to exercise their imaginative competence based on their best experiences, their core human values, their appreciation of interdependencies and their collective goodwill. The process generates a higher order convergence, which serves to connect multiple and equally important priorities without resorting to compliant compromises, parallel and competing visions, reductionist or subversive specialisations.

Commitment to provocative propositions, a compelling, overarching 'flagpole' statement, or a framework of principles provides the strategic and social architecture that informs to 'Design' phase of the AI (see Figure 1).

Operational implications of dreaming

In the 'Design' phase ('co-constructing what should be') participants co-construct their new reality based on their articulation of direction, principles, strategic framework. Questions relate to what would be ideal, how we can make it work and what conceptual, behaviour, operational changes we need to make.

Hard work is willingly undertaken here as concept teams, project teams, task forces and working parties

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Again, there are options with regard to the collation and sharing of data which emerges from the 'Discovery' phase (see Figure 1). A small group may be requested to develop a new vision relative to the topic of the inquiry or the entire group may (with facilitator support) extract themes and topics that are used to inform the second of the 4D phases, 'Dream' (see Figure 1) and the development of provocative propositions

Provocative propositions

During the 'Dream' phase ('imagining what might be'), participants are asked to envision results and engage in future search. Information from the 'Discover' phase is used as a platform to speculate on possible and desired futures for the organisation, system or team. Participants may self-select, depending on their interest and expertise, key themes which they transform into statements of strategic and social intent – that is, positive propositions that excite them, stretch them and guide them towards a preferred future. The beauty in this process lies in the connections people see and express in where they want to go taking what they really value with them.

The process provides people with the opportunity to exercise their imaginative competence based on their best experiences, their core human values, their appreciation of interdependencies and their collective goodwill. The process generates a higher order convergence, which serves to connect multiple and equally important priorities without resorting to compliant compromises, parallel and competing visions, reductionist or subversive specialisations.

Commitment to provocative propositions, a compelling, overarching 'flagpole' statement, or a framework of principles provides the strategic and social architecture that informs to 'Design' phase of the AI (see Figure 1).

Operational implications of dreaming

In the 'Design' phase ('co-constructing what should be') participants co-construct their new reality based on their articulation of direction, principles, strategic framework. Questions relate to what would be ideal, how we can make it work and what conceptual, behaviour, operational changes we need to make.

Hard work is willingly undertaken here as concept teams, project teams, task forces and working parties

form voluntarily to work through 'making it happen'. The emphasis is on practically working through the transitions required to achieve the provocative propositions. In the process, propositions may be recast, the spirit of intent may be further questioned and infinite iterations may emerge.

The essence is that a positive momentum has been generated and, underpinned by a shared 'headset of intent', multiple intelligences are legitimised to progress the agenda. Having been through the 'Discovery' and 'Dreaming' phases, people see where they fit, how they're connected to and valued in the process of achieving the outcome. This generates a confidence and capacity to contribute which, in organisations today, is priceless.

Delivering and rediscovering

The 4D cycle evolves through 'Design' to the 'Deliver' phase ('sustaining, learning, adjusting', see Figure 1) as participants affirm their achievements. Reflection on key measures of effectiveness, ways of knowing, recognising and acknowledging what has been achieved are encouraged.

Simple scorecards with key performance indicators linked to original propositions may be tabled and endorsed. New quantitative and qualitative benchmarks may be proposed so participants progressively validate their improvements. Positive shifts in strategy, structure and culture are marked and used to inform new questions and conversations as the 4D cycle is revisited for ongoing planning and review purposes.

What's so special about AI?

For those of us involved in working with groups, large and small, in turbulent contexts where, increasingly, we experience the diminishing marginal returns of traditional practices, AI offers a new dimension in OD consulting.

The approach, principles and model provides an integrating framework within which multiple strategies, tailored to context may flexibly be applied. More fundamentally, as OD practitioners, change agents and leaders we are encouraged to acknowledge our own assumptions about professional practice and embody the spirit of AI in our lives.

Appreciative Inquiry is not a technique; it cannot be applied as a mechanism for change, it cannot be contrived. The approach requires willingness on behalf of the advocate and the client to search systematically for possibilities and potential, and to provide scope for diversity and synergy to co-exist in the pursuit of collective interest based on mutual understanding.

The potency of the approach lies in the frames of positive inquiry and the realisation that change and inquiry are simultaneous. A genuine curiosity, preparedness to listen and relentless reframing of issues into opportunities is grist to the appreciative inquiry mill. The outcomes are sweet in terms of participant generated, positive and sustainable change.

Examples and results

In Australia, we have used AI extensively in government, in the higher education sector, in schools, with community organisations and in professional service firms. Effectively, it has provided an energising and participative dimension to complex planning, supporting structural changes, working collaboratively across business units, engaging communities and external stakeholders in matters ranging from policy development to resource allocation.

Results have been achieved in terms of improved

> Together, the group identifies **binding topics, compelling themes** and **core values**

service cultures, structural realignment without industrial disputation, community renewal projects, integrated government service delivery, reduced costs of duplication and in-house competition, school-based management, and resolution of cultural conflicts.

Conclusion

We are convinced that the AI approach to change is suited to environments characterised by impermanence, turbulence, multiple and competing agendas, ideological diversity and cultural conflict. AI offers hope and space for participants to influence and determine their preferred future. The connections between macro and micro strategies, strategic and operational matters and individual fit within the system become clear. The approach generates focus, creativity and goodwill. These capacities are self-sustaining, build adaptive competence and sustain complex systems in change.

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1. Job instruction, behaviour modelling, action learning, project management, coaching, mentoring, problem-based learning, business planning, change management, team development, network management, visualisation theory, imaging, futuring, scenario planning and so on.

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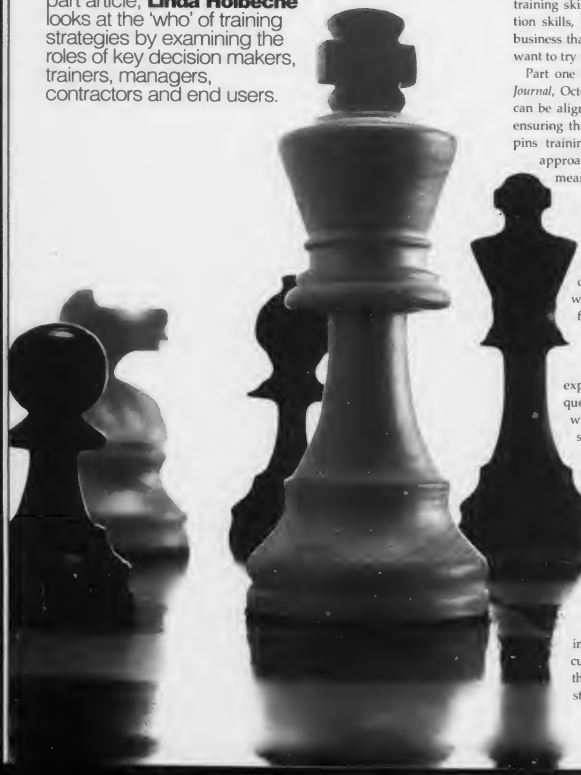
Bonding training to strategy

Part two

In the second of her three-part article, **Linda Holbeche** looks at the 'who' of training strategies by examining the roles of key decision makers, trainers, managers, contractors and end users.



In times gone by it used to be thought that, rather like teaching, 'those who can do; those who can't, train'. Nowadays, so keen is the awareness of the importance of conventional training skills, such as presentation and facilitation skills, to the winning and development of business that there is no shortage of 'doers' who want to try their hands at training.

Part one of this article (published in *Training Journal*, October 1999), focused on how training can be aligned to the organisation's strategy by ensuring that the organisation's purpose underpins training activity. This business-orientated approach to training and development means addressing the 'what' and the 'why' of training in such a way that every training activity adds value to the organisation. Broadly speaking this involves looking at where we are now – that is, the current position of the overall organisation – as well as where we want to be in the next three to five years. Training and development is then designed to close gaps in the overall organisation performance.

In Part two of this article, I shall explore another of the related strategic questions that has a major bearing on whether the implementation of training strategies is seen to be successful or not. This question is: *Who* is involved? In other words, who are the stakeholders including customers, end-users, champions and sponsors, senior managers, shareholders, the community, as well as the designers and deliverers of training whose interests must be served through training?

It could be argued that the most important stakeholders of training are customers, without whose satisfaction the organisation cannot serve its other stakeholders, including shareholders

and employees. Of course, if the business strategy is focused on the market-place (which seems highly likely), the needs of customers should be reflected in many organisational objectives. These should, in turn, drive the analysis of training needs, the choice of priorities and the choice of delivery.

However, the importance of winning the support and interest of key internal stakeholders in ensuring that training can play its rightful part in meeting customer needs cannot be over-emphasised. It's a minefield out there! Training is not taking place in a neutral and logical environment, and the value of training cannot be expected to speak for itself.

Many is the programme that has appeared to meet delegates' needs but is axed because of disputes between potential programme sponsors. Just waiting to follow the prevailing strongest voice is no recipe for adding value strategically.

In part one, I argued that the best way of creating strategies is to do this in partnership with key internal clients. These are people who should be closely in touch with the business needs but who also have a direct interest in the outcome of training. Training should help them achieve better results from their part of the business. The training function needs to be proactive in developing relationships with a range of key decision makers who will sponsor and support training effort. Within the organisation these are likely to be business leaders and senior managers who have responsibility for parts of the business. In addition, some of their 'lieutenants' may wield enormous influence at senior levels and neglecting their views may be unwise.

Given the essentially political nature of decision making, trainers need to be adept at networking and influencing skills; they must recognise personality clashes and personal agendas and find ways, if need be, to steer round political obstacles. It is not enough to do a good job; you must also be *seen* to be doing a good job.

Having identified the key stakeholders, it is important to find out what is important to them. What are their main objectives and concerns? How can training help to resolve a problem in their part of the business? (Typical questions to establish areas of importance might include those that appear in Figure 1.) Training can then be focused on the areas that matter most in the realisation of the organisation's strategy.

To be credible within the organisation, trainers need to be able to speak 'business language' and show an understanding of operational issues. Acquiring this knowledge need not take a long time. Taking part in project groups, listening to delegates' issues and keeping informed about changing strategic messages are all part of the process.

Ideally, trainers' own backgrounds should involve a range of business experiences – including having worked in other organisations – from which they draw. Trainers also need to show their awareness of the changing external environment and its impact on the organisation. Benchmarking against competitors and best practice organisations can provide the organisation with a much needed external dipstick, but should not become the main guide to decision making about training.

While doing your homework on the competition can highlight important gaps and opportunities, it is vital that decisions about what training is required are focused on your own organisation's strategy and ambitions rather than being a mere copy of others' existing efforts. After all, training strategies should be forward-looking and emerging needs may be more important than those currently recognised by competitors.

Just waiting to follow the prevailing strongest voice **is no recipe for adding value strategically**

The people engaged in training need to be knowledgeable and skilled in the tools of their trade. Increasingly, the range of people providing training includes a mix of internal and external suppliers, some of whom are expert trainers while others have specialist knowledge, line management experience, business expertise or a combination of all of these.

Specialist trainers are increasingly enhancing their status through continuing professional development and gaining membership of professional bodies including IPD. Trainers need high-level diagnostic and design skills, communication, interpersonal, analytical and creative thinking skills, plus the ability to engage other people in the learning process.

Given the essentially 'front line' and solo performance nature of some training, the development of confident, self-aware teams who are consciously striving to improve business results through training can be difficult to achieve. Leaders of teams of trainers often liken the process to herding cats. ➤

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Training managers need good negotiation and influencing skills as well as the ability to manage and improve quality in what is a highly volatile human product. They need to be able to inspire and develop teams who are willing to generate shared knowledge and take pride in group achievements. They also need to be able to represent adequately the training team to senior managers and not be afraid to talk about the team's successes. Training managers should therefore model the skills and values that they, as leaders, subscribe to. The role of the training manager should be a vital conduit to the business, ensuring that what is being planned and delivered is meeting business needs.

It is not enough to do a good job; you must also **be seen to be doing a good job**

In recent years there have been a number of contradictory trends with regard to the structure of training groups. Many centralised training functions have been down-sized while demand for training has gone up. In some cases, 'technical' training is provided locally with management development and organisation development interventions still managed centrally. In some organisations, training is being pulled back from the local to the central in a bid to avoid duplication. In many public sector organisations, training has largely been outsourced, with the remaining training function becoming a purchasing and quality assurance body.

Increasingly, organisations appear to be re-employing their own trainers who can become experts in that business and in providing solutions to business issues. For many training managers, a key challenge is that of providing the 'right' trainer to meet specific needs – whether this is an internal member of staff or a contractor / consultant – while at the same time enabling internal trainers to have some sort of career progression.

In some companies the various training-related roles have been clearly demarcated. Some people act as 'deliverers', others as 'business consultants', while others act as strategists. While these divisions may make sense in ensuring that key activities are carried out, rigid boundaries between roles can lead to frustration for those who feel trapped in a delivery role and therefore lack the opportunity to develop other skills. Arguably, many forms of technical training are perhaps best delivered by the local expert rather than a dedicated trainer. The challenge then is to negotiate responsibilities and provide development for the business unit trainer who may be required to supply expertise beyond their own business unit.

Figure 1: Typical questions that establish areas of importance to key stakeholders

- How are your major objectives likely to change in the next three to five years?
- What is the current culture of your part of the organisation and what sort of culture would you like to achieve?
- What skills, behaviour and attitudes do people in your part of the organisation need in order to achieve its main objectives?
- What would you wish to see in the training strategy?

Similarly, the core skills of training as described above are increasingly recognised as important by many line managers who wish to take part in providing training. After all, managers are responsible for performance in their areas and have a vested interest in ensuring that training adds value. Involving line managers in providing training can avoid a common issue for many organisations with a centralised training function. This is the tendency for some line managers to arrange and purchase training without keeping the central function informed.

For the training function, involving line managers in providing training can be very beneficial as long as the managers in question are helped, if need be, to deliver their messages effectively. This may involve providing train-the-trainers, personalised coaching and other forms of support.

Especially when the training forms part of a culture change initiative, involving line managers can be a powerful symbol of the new direction, and line managers often appreciate the chance to enhance their visibility and facilitating skills. Managers are also critical to the effective assessment of training needs in their own parts of the business, whether this is carried out through performance appraisals or specific initiatives. Involving managers as observers in development centres, for instance, can provide them with much needed insights into how they can more accurately assess performance and identity needs. They are also more likely to feel a sense of ownership of training and provide follow-through of training on the job.

Increasingly, internal trainers are required to work in partnership with a range of external providers in delivering complex organisation development projects. Internal trainers need to be able to achieve the best outcomes for the organisation by the way in which they manage relationships and delivery. This is not always an easy task. While the internal trainer may be looking for consistency between the different elements of the project, indi-

vidual contractors may seek to avoid sharing their frameworks and approaches with other contractors on the project.

Gaining agreement to sharing is not always easy to achieve when a project is under way, and the challenge for trainers is to set clear expectations and gain commitment to providing a seamless experience for end-users at contract stage.

Selecting consultants and contractors who 'fit' the organisation but add value through their skills and external perspective is no mean feat, especially when a range of people are involved in making the selection. Managing the project usually remains the responsibility of, the training function and performance needs to be monitored. Yet the way in which the project is managed can have a major impact on the project's success. If contractors are treated as suppliers, they tend to view the project in that way. Unless the consultant is seen as a one-off 'pair of hands', I suggest that the most effective approach tends to be one in which external and internal trainers work in partnership on a basis of mutual trust, respect and investment in the success of the outcomes. In many ways, the in-house training team becomes the 'glue' in a complex project, ensuring that accurately diagnosed needs are being met in a high quality way, using the relevant resources.

For training to be effective, it must deliver real learning to the people who take part. This means that trainers must understand the contexts and changing requirements of different roles. These changing requirements may go beyond the mere acquisition of knowledge and involve changing attitudes in some cases. Many employees, for instance, are required to work in teams – especially across boundaries of department, function and, in the case of joint venture, organisation.

These partnership approaches to the generation and implementation of business are very different from conventional team working and call for high levels of trust as well as the ability to adopt flexible working practices. Whatever the content of the training, the design of the programme should take into account contextual issues such as these and support people in the ongoing acquisition of new approaches.

In many organisations the impact of technology has meant that new forms of business activity have been created and people rapidly have to understand a new paradigm of doing business through ecommerce. Many course participants feel so overwhelmed with work, especially since the use of email and mobile phones has led to on-demand contact, that they feel unable to absent themselves from the workplace for more than a couple of hours. Their ability to concentrate on anything that is other than high impact and impressive can cause them to consider anything that appears to offer a slower pace a waste of time. Trainers need to be responsive but at the same time challenging so they can provide end-users with a more useful resource than ten 'top tips', which may or may not work.

Finally, the dynamics of any business are bound to be reflected in the nature of what goes on in the training room. People are usually more than willing to talk openly about how the business is going, what is working and what is not, but usually this information is treated as navel-gazing and stays in the training room. In some forms of training, trainers are required to produce an assessment of participants' learning, especially when the training is knowledge based. This assessment often involves testing and a report back to the organisation.

In other forms of training, especially that which is behaviourally based, the trainer is usually bound by the rules of confidentiality so that personal learning can take place in a 'safe' environment.

Trainers have a unique opportunity to act as sensors of employee morale and of the practical challenges of implementing business strategy. Though this may seem controversial, I suspect that the opportunity to add value with that intelligence is missed if it remains within the training room.

Trainers can help close the loop between strategy designers and implementers. This means that trainers could and perhaps should be feeding back to key decision makers the issues that arise in the training room without, of course, breaking individual confidentiality. This provides strategy designers with the chance to adjust plans, make them more workable or perhaps capitalise on opportunities that employees are aware of, but that have not yet been exploited.

Training managers should **model the skills and values** that they, as leaders, subscribe to

The real value of training then becomes not merely the development of the right skills, behaviours and attitudes to achieve business aims, but the manner in which a two-way flow of ideas enables the organisation to make the most of its employee potential.

Part three of this feature will be published in the December issue of *Training Journal*.

Mergers and acquisitions: the route to failure?

It's inevitable that when two businesses merge, there will be conflict, competition and anxiety. But, as **Professor Roger Gill** shows, the journey towards successful mergers and aquisitions can be made smoother through the use of a leadership development agenda.

Merger mania and the appetite for acquisitions that we have witnessed over the past few years have produced an awesome casualty list. AT&T suffered a US$4 billion bill and a disaster for employee livelihoods and morale when it had to reverse its failed acquisition of NCR. Quaker Oats made the same mistake with Snapple. Dunlop and Pirelli's merger turned sour despite their business similarities. The Wells Fargo and Union Pacific merger failed to address the human issue adequately: it fired the wrong people.

Failed mergers and acquisitions (M&As) are usually characterised by a shareholder rather than an employee focus and, according to Mitchell Lee Marks, an American management consultant, a financial emphasis pre-merger, a political approach to managing the process and damage control afterwards. M&As frequently fail because of incompatible corporate cultures, known as 'merger syndrome'.

Corporate culture is the set of collectively shared values, beliefs, traditions and behavioural norms unique to a particular organisation. It is therefore a self-evident truth that M&As will result in culture clash. Recognising this is part of the solution for a

successful corporate marriage or adoption.

Corporate culture is reflected in the symbols the company holds dear, its heroes and the rituals people perform – 'the way we do things here'. It shows itself in many structural, procedural and behavioural characteristics of organisations: centralisation versus decentralisation of operations, decision making, the use of formal authority through hierarchy versus the use of influence in more egalitarian work groups, whether and how information and knowledge are shared, communication methods, performance appraisal and how conflict is handled, among others.

The human issues

What human issues typically arise in M&As? In mergers, managers and executives in one partner frequently complain that the other partner is the dominant one and that they are losing out. An 'us versus them' climate develops. They may feel much on the defensive when they are retained or appointed to their jobs over candidates from the partner. They usually complain about a lack of information and consultation on jobs, retrenchment, voluntary redundancy policy and pay packages. People fear the worst and demoralising rumours fill the void.

Change is the challenge

When a company acquires or merges with another, it is a time of significant change. Change fails for many reasons such as lack of communication, unresolved conflicts, poor planning and co-ordination, incompatible human resource policies and practices, and change being grafted on through *ad hoc* strategies. Change brings with it tension, stress, squabbling, undermining and even sabotage – all draining money, time, energy and emotions, all symptoms of resistance to change.

Why do people resist change? The prime mover is self-interest. The future is less certain than the present and even more so with a new organisation: better the devil you know than the one you do not. What seems to influence acceptance of change has to do with information about it, communication, participation in decisions to change, the likely impact on our relationships and the degree of trust in the initiator of change.

It is a sad fact that some 70 per cent of employees in the USA feel that trust and loyalty are declining, and that 60 per cent feel that their managements are not honest or ethical. Yet paradoxically some 92 per cent of senior executives in a sample of *Fortune 500* companies in the USA regard leadership as key to successful change and 84 per cent emphasise the importance of corporate values.

Simon Hollington at The Leadership Trust in Ross-on-Wye is investigating the relationship between the values leaders espouse and their leadership behaviour. 'Leaders walk their talk; in true leaders there is no gap between the theories they espouse and their practice,' says Warren Bennis, the noted American leadership expert.

While change has to be managed well, even more important is leadership – not so much getting people even to accept it as getting people to want it. And the leadership of change requires effective emotional intelligence, the ability to recognise our own and others' feelings, and manage our relationships through self-control, self-motivation, empathy and interpersonal skills.

The arrival of a new person who is 'different' in a company made up of people who have become very similar in their habits, values and routines is uncomfortable or threatening. This leads to resistance to change. Gaining people's commitment to change means minimising that difference – retaining habits, values, routines, traditions, like Roger Smith did as chairman of General Motors when he said: 'I'm going to manage this company the way Alfred Sloan intended it to be managed.'

> It is a self-evident truth that M&As will result in **culture clash**; recognising this is part of the **solution for a successful corporate marriage**

One of the problems of change during M&As is that change is exciting when we do it and threatening when it is done to us. The solution must be to participate in it. Participating in change creates ownership of it and therefore commitment to it. But change requires direction, and the leaders at the top need to have a clear vision of where the change will take the new company and to communicate this in an inspiring way.

A key element in corporate culture and successful change is leadership style. Richard Schoenberg at Imperial College Business School found in a study of M&As that some 35 per cent of 130 major companies' acquisitions had different leadership styles, and the wider the gap, the lower the likelihood of success. About half of the companies' managers judged the merger or acquisition to be a failure.

The recipe for successful M&As

Success with M&As results from a strategic approach, careful merger planning and management, and effective leadership. A strategic approach means creating a new vision for the new company and communicating it in an inspiring way, setting out clear corporate values, and formulating clear ➤

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goals for the change and a transition management plan. Merger management requires attention to organisation structure, staff roles and selection, lay-off and reward policy. Leadership entails monitoring and responding to employee attitudes and feelings, teambuilding and, above all, communication, communication, communication! Underlying successful merger management is the need for all-encompassing training in the skills required; all too often this is abysmally poor in failed M&As.

Examples of successful M&As

What have companies done in successful M&As? As part of its business transformation after privatisation, ScottishPower acquired Manweb and Southern Water. To plan and manage these acquisitions it created joint 'transition' teams. These teams consisted of managers with shared values from both companies who carefully focused on formulating human resource plans, training and personal development, not only for employees but also for their families and the communities they served.

Another business strategy of ScottishPower was the creation of ScottishTelecom, whose rapid growth included the notable acquisition of Internet service provider Demon. Former Demon employees began

> The future is less certain than the present and even more so with a new organisation: **better the devil you know** than the one you do not

to feel intimidated by big brother. Creating one identity for the business and reinforcing the positive features of the different cultures within Scottish Telecom became its priority.

Its strategy for doing this was its Impact programme – management and leadership development in partnership with Strathclyde Graduate Business School. This strategy has involved increasing leadership self-awareness, developing situational and transformational leadership skills, networking, team building, knowledge sharing and mentoring. 'It is about using a management development programme as a lever to support change,' says Anne Shiels, Scottish Telecoms' human resources director.

In M&As, an analysis of corporate cultures and a plan for cultural differentiation or integration and management are important. In the takeover of Bristol and West Building Society by the Bank of Ireland, there was integration of strategy at the top but autonomy of local management left intact. BT carefully evaluates the corporate culture of prospective acquisitions and plans how it is going to communicate with employees. It identifies sensitivities in employee relations, clarifies the critical people issues, develops a resourcing plan, and ensures there is agreement over human resource policies and practices. And it places a great deal of emphasis on developing and displaying inspirational leadership.

The merger of Commercial Union and General Accident in 1998 focused on involving people in creating the new CGU. The change strategy was to involve management, employees and unions in planning the change process. Employees were told of the merger the morning it was publicly announced. The announcement included intentions to retain a local office network, a new organisation designed on clear principles and staff selection according to clear, objective criteria. Employees were consulted through opinion surveys on what CGU would need to become to perform best. First-line supervisors were trained in their Discovery programme to assess the culture of each company in pairs, one from each company. The results formed a 'culture map' of each company – how they were similar and different, and what one had that the other would like.

The unions from both companies were next brought into a Being One event, where some 500 managers, supervisors, technical specialists and union representatives worked on the results of the Discovery programme, focusing on getting work done, leading and managing people, developing and rewarding people, and working atmosphere and the environment. They had to face up to anger at lack of leadership and tolerance of poor performance.

A group of middle managers then set about information gathering and benchmarking best practice. The third major task was to involve a representative sample of managers, supervisors, technical specialists and union representatives with facilitators to forge a blueprint for the new organisation. While there has been pain, this participative approach to implementing a merger has drawn in people's ideas and captured their energy, at all levels – a formula for successful change.

Starting with a clean slate can ease the merger or acquisition process. When AAH took over Lloyds Chemists in 1997, it was clear that both companies had very different cultures but neither had company-wide human resource policies and strategies. The cultural similarity was just that. 'I can't go wrong because anything I do has got to be an improvement on what happened before,' said Graham Kershaw, group human resources director of AAH.

This was an opportunity to create an organisation that was responsive to change, participative in its style and focused on business objectives. Again, communication was top priority, with team briefings, a telephone helpline, a monthly newsletter to keep employees informed about the progress of the merger, with readers' questions answered.

goals for the change and a transition management plan. Merger management requires attention to organisation structure, staff roles and selection, lay-off and reward policy. Leadership entails monitoring and responding to employee attitudes and feelings, teambuilding and, above all, communication, communication, communication! Underlying successful merger management is the need for all-encompassing training in the skills required; all too often this is abysmally poor in failed M&As.

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In M&As, an analysis of corporate cultures and a plan for cultural differentiation or integration and management are important. In the takeover of Bristol and West Building Society by the Bank of Ireland, there was integration of strategy at the top but autonomy of local management left intact. BT carefully evaluates the corporate culture of prospective acquisitions and plans how it is going to communicate with employees. It identifies sensitivities in employee relations, clarifies the critical people issues, develops a resourcing plan, and ensures there is agreement over human resource policies and practices. And it places a great deal of emphasis on developing and displaying inspirational leadership.

The merger of Commercial Union and General Accident in 1998 focused on involving people in creating the new CGU. The change strategy was to involve management, employees and unions in planning the change process. Employees were told of the merger the morning it was publicly announced. The announcement included intentions to retain a local office network, a new organisation designed on clear principles and staff selection according to clear, objective criteria. Employees were consulted through opinion surveys on what CGU would need to become to perform best. First-line supervisors were trained in their Discovery programme to assess the culture of each company in pairs, one from each company. The results formed a 'culture map' of each company – how they were similar and different, and what one had that the other would like.

The unions from both companies were next brought into a Being One event, where some 500 managers, supervisors, technical specialists and union representatives worked on the results of the Discovery programme, focusing on getting work done, leading and managing people, developing and rewarding people, and working atmosphere and the environment. They had to face up to anger at lack of leadership and tolerance of poor performance.

A group of middle managers then set about information gathering and benchmarking best practice. The third major task was to involve a representative sample of managers, supervisors, technical specialists and union representatives with facilitators to forge a blueprint for the new organisation. While there has been pain, this participative approach to implementing a merger has drawn in people's ideas and captured their energy, at all levels – a formula for sucessful change.

Starting with a clean slate can ease the merger or acqusition process. When AAH took over Lloyds Chemists in 1997, it was clear that both companies had very different cultures but neither had company-wide human resource policies and strategies. The cultural similarity was just that. 'I can't go wrong because anything I do has got to be an improvement on what happened before,' said Graham Kershaw, group human resources director of AAH.

This was an opportunity to create an organisation that was responsive to change, participative in its style and focused on business objectives. Again, communication was top priority, with team briefings, a telephone helpline, a monthly newsletter to keep employees informed about the progress of the merger, with readers' questions answered.

A unified pay and benefits structure and a competency framework were developed, and a new emphasis on performance review, identifying training needs, and training and development introduced. Like ScottishPower, the aim was to create a learning organisation, '… to create a culture,' Kershaw says, 'where people think it is so good working here that they see no point in moving to another employer.'

Success from training and leadership

Training has a vital role to play in achieving successful M&As. What the examples in this article demonstrate is the importance of employee and management training in several areas:

- goal setting and gaining commitment to goals
- making decisions in different ways – for example, by consultation and by consensus
- the change process and facilitation skills
- communication and briefing skills
- conflict management
- teambuilding (recognising and responding to our own and other people's feelings), and
- (perhaps most importantly) influencing and leadership skills.

Leadership development is key to successful organisational change during M&As and leadership skills can be improved through training. At The Leadership Trust we focus in our leadership development programmes on helping participants to do the following.

- Increase their self-awareness, self-control and self-confidence.
- Understand what motivates and demotivates people.
- Develop mutual trust, respect and support.
- Understand and learn how to handle one's own and others' innermost needs and fears.
- Understand how to handle conflict and aggression.

All of these will improve chances of achieving successful M&As. In terms of leadership challenge of M&As, given these skills, leaders of organisational change need to do the following.

- Create an attractive vision of the new organisation's future.
- Communicate it in an inspiring way.
- Create or reinforce and implement strong corporate values.
- Formulate and implement business and HR strategies that are perceived to be rational and credible.
- Empower people to participate in the change process and manage themselves.

Leadership is about using our personal power to win the hearts and minds of people to achieve a common purpose captured in a compelling vision. The minds may be won by giving people a clear understanding of what they have to do, why and how. The hearts may be won by generating feelings of ownership of the what and the how, challenge, commitment and excitement through involving them in forging their destiny. This is the leadership development agenda for successful M&As.

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Train in a multi

Angelique Keene leads us through the process of individual and team learning in the context of a life-long journey.

Deciding on when, how and if training is needed may not always be a logically planned decision. The decision will be influenced by factors such as the available funds and what topic or approach is enjoying popularity at the time. For example, the emphasis on team work currently influences the direction training will take in many instances. It then depends on who the preferred suppliers are as to who will deliver the training, what the content will be and where the emphasis will be placed. Not often do we stop long enough to consider whether the topic, method and timing is appropriate either for individuals or groups, nor what the possible consequences may be.

When considering the objectives of training, we need to devote equal attention to both the *outputs* and the *inputs* of what it is we want to achieve from a particular training and development programme. Raising issues such as these will also address one of the considered weaknesses of training which is the transference of the skills back into the workplace. The involvement of the

ng & learning: i-disciplined approach

individuals and groups who are to participate in the training should be considered in the discussion of these issues. The vision, goals and objectives of the organisation will only be implemented if they are reflected in the personal outcomes of the individuals. If we are, therefore, to link the vision of the organisation with training needs, the needs of individuals and groups have to be considered in the discussions. At present those who will undergo the training programme may not always have a great deal of influence over these questions.

Through our scientific methods of studying organisational phenomena, the approach has been to isolate different aspects of organisations and study each topic in isolation of the remainder. We separate learning from the environment, the problem and the people involved. We tend to see training and learning as a separate process from implementation; the 'doing'. Learning is not an activity that is carried out in isolation, but is part of the constant flow of adaption and experimentation which is done in partnership with others in the organisation, the organisation itself and the environment in which the learner finds him/herself.

> Part of the process of learning together is creating the **opportunity for practice**

Part of the process of learning together is creating the opportunity for practice. For a group to learn together effectively, the starting point has to be the ability to reflect on issues such as assumptions held within the group, successes and failures. If we understand the reasons for our success we could duplicate the strategies. Equally, if we understand the reasons for failures, we can do something different.

A key aspect to successful teams is an understanding of the differences within the team and how to value these differences. Harnessing these differences will benefit both individuals and the organisation in the achievement of goals and ➤

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objectives. Valuable lessons can be learnt from someone different to you, yet because difference can be difficult and could potentially result in conflict, we go to great lengths in suppressing these differences.

Through suppressing difference and seeking sameness, we create blind spots. We need diversity to ensure all angles of an issue are being explored. It is in diverse groups that the power of dialogue is a fundamental skill in maximising the potential for learning and creativity which lies beyond the understanding and knowledge of one individual.

Dialogue is instrumental in raising and understanding assumptions. It is the reflective process which allows us not only to tease out and understand our underlying thoughts, but also the process of thinking itself.

A key aspect to successful teams is an **understanding of the differences** within the team and how to value these differences

A fundamental result of the process of learning for both the individual and the organisation is that through the process of learning we recreate ourselves; we become more of who we are capable of being. For the organisation to expand the possibilities and options of what it could become, learning in all its many facets should feature high on everyone's list of priorities.

The new sciences

The study of Complex Adaptive Systems is arousing much interest as a paradigm and model for studying organisational behaviour and associated disciplines. What complexity theory tells us is that emergent reality is the result of the connection of the agents within the system and the constant reaction and interaction between these agents, the system itself and the environment. See Figure 1.

Each agent in the system plays a key role in the ultimate reality which is a constantly emerging process. Every agent can, therefore, be viewed as a co-creator of the system. As reality and new order emerges as a result of this intricate interaction between the agents, the system and the environment, prediction as to the shape this reality will take is impossible.

Each decision taken by the agents is as a result of responding to the decisions and action of other agents which in turn determines the next decision or action. The assumption is made that as co-creators, the agents are therefore also accountable and responsible for the outcome of their interaction with each other.

Applying the theory of complexity to organisations, an organisation can be viewed as a complex system and the agents which act and react with each other as well as the organisation seen as the employees who make up the organisation. The study of complexity further reveals that complexity is the result of simplicity.

A complex system is governed by only a few rules. If we transfer this principle to organisations, what we could learn is that the vision, values and guiding principles of the organisation will act as the steering mechanism for the organisation. All decisions and actions will be influenced by these few rules. The achievement of the vision and the practicalities of making it a reality will influence the training decisions as well and eliminate some of the *ad hoc* nature of training and development.

The nature of learning

The study of complexity reveals the fact that the system learns together through the interaction of the various agents. Rigid boundaries isolate individuals which stifles the ability for learning and creating together. There are different levels of learning and the training we are most familiar with is that of single loop learning which includes skills-based training.

Learning to do more of the same, albeit differently or better, is no longer adequate. Transformational learning is necessary to create a shift in people's context or points of view about themselves and their environment. It has to do with fundamentally reshaping our thinking and actions in order to reach goals or solve specific problems.

In order to learn to do something differently, we have to challenge and question our frame of reference, our assumptions about what we consider right and wrong. It is about understanding not only what we think, but how we think and how this affects our actions and decisions. Part of this learning process is the ability to question, learn and engage in true dialogue with others in order to surface and challenge our assumptions.

Learning is also a state of mind or attitude we need to develop throughout our lives and is not limited to a technical skill we develop for a specific task. Further reference to the study of complexity reveals that learning is part of the process agents undergo as a result of their co-creative activity with each other. It is part of the adaptive process to an ever changing and emerging reality.

We have to continuously adapt and change our knowledge and understanding in the light of a constantly shifting outer reality. Not only does learning encompass the required skills, but also knowledge and attitude. Learning is a process that includes the right abilities (skills), the right information (knowledge) driven by the desire and ability to learn (attitude).

Furthermore, an element of serious playfulness aids the process of learning; the need to experiment, risk and the courage to ask those questions considered irrelevant or challenging.

Accountability

We can further draw insight from psychology and an understanding of the games we play both individually and collectively. The pay-off of such games is that a predictable result ensues which is the purpose of the game playing. One such game we have been playing in organisations is the relationship between the leaders and the led. The organisation and their leaders have acted as the parent figure, taking care of the needs of those dependent on them, that is, the needs of employees. In exchange for the perceived security, employees offered their skills and talents to organisations.

One of the implicit expectations has been the provision of a job for life, which is no longer part of the psychological contract. A new contract has to be negotiated and the parent:child relationship is no longer adequate in a fast changing and unpredictable environment in which certainties cannot be guaranteed, including a job for life. To facilitate the acceptance and creation of accountability, training and development has to be focused on two levels. We have to teach management and leaders to let go of the need for control and to start sharing responsibility with employees.

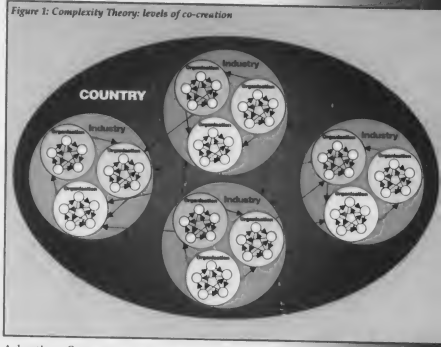
Much has been written about empowerment, but there are serious doubts as to the actuality of empowerment in practice. It may be that the starting point for empowerment has to be a dialogue within organisations as to what empowerment means to different people and what the assumptions are regarding empowerment. Building shared understanding is key to the success of implementing empowerment in practice.

The second area of focus in the creation of accountability is to teach employees to relinquish the need for being taken care of. Resistance to change and the fear of the unknown are issues that have to be explored and brought into the open. Organisational change is handicapped by the resistance to change and the fear of the unknown for individuals concerned.

The requirements of the environment today are very much different, necessitating a shared responsibility and a very different contract from that of the past. As employees, we have to let go of the comfort of a secure environment and instead, take up the challenge of self-responsibility and self-development. As individuals develop security in their own abilities and employability and learn to balance the paradox of security and uncertainty, their performance increases.

Through the creation of a sense of personal mastery and control, an adult:adult relationship with the organisation results. As we have seen from the discussions of the theory of complexity, each agent is a co-creator of the reality of the system which will emerge. If we view employees in a similar role within the organisation as a Complex

Figure 1: Complexity Theory: levels of co-creation



Adaptive Systems, training and learning is included in the need to learn how to be accountable for all aspects of our working lives. The choices we make shape our environment which in turn influences the next choice we face. Employees, as individuals and groups, need greater accountability and say in the nature of the training and learning they undertake.

Conclusion

For organisations to benefit from the talents and abilities employees offer, a closer partnership needs to be forged with individuals in terms of planning individual and group learning. It is not a process to be decided in isolation, but a multitude of issues need to be considered. The vision and purpose of the organisation should be the guiding principle which influences subsequent decisions.

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Through the creation of a sense of personal mastery and control, an adult:adult relationship with the organisation results. As we have seen from the discussions of the theory of complexity, each agent is a co-creator of the reality of the system which will emerge. If we view employees in a similar role within the organisation as a Complex Adaptive Systems, training and learning is included in the need to learn how to be accountable for all aspects of our working lives. The choices we make shape our environment which in turn influences the next choice we face. Employees, as individuals and groups, need greater accountability and say in the nature of the training and learning they undertake.

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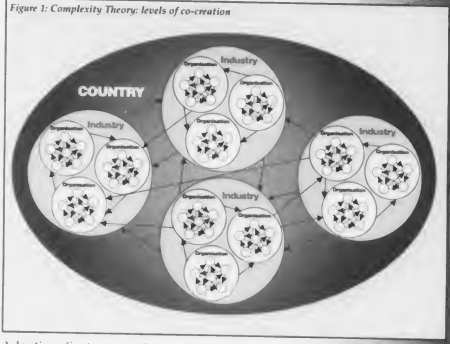

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Training multinational groups: more than minding manners

Imagine you are, say, Italian and are attending a training session in England. Your knowledge of English is basic, yet you are expected to grasp not only the intricacies of the language but also some complex work-related concepts. **Robert Day** sympathises, and offers some invaluable tips to trainers to make your life easier.

'Blob, I could not compete with my idea!' were the frustrated words to me of an Italian sales manager who had just attended (along with colleagues from the UK, Germany, France, The Netherlands and Spain) a company-sponsored marketing training programme for European sales management. He'd had a difficult day trying to use a language that wasn't his mother tongue to express important and complex ideas in a setting dominated by native English speaking presenters and delegates. His level of English wasn't the problem, but the way the training was conducted most definitely was. However, he had stuck it out, paid attention (most of the time), awarded politely mediocre ratings on the evaluation form, vented his frustration ... then left for the airport.

As business organisations and operations become more international, in-house trainers and training managers find that they are increasingly responsible for delivering training to audiences of mixed nationalities and native language backgrounds. On the face of it, UK (and American, Canadian and so on) training professionals ought

to be well placed: we speak English, the language of international business is most often English and participants speak English to a greater or lesser degree. But being a competent trainer and having a shared language are not enough. Unless we want other trainees to relive the experience of our Italian sales manager, we need to set these assumptions aside and focus on the particular needs of the multinational non-native English-speaking (NNES) audience. If we do not, not only will the effectiveness of our training suffer due to poor delivery, but the perception of the company as a whole and of headquarters (if, as is often the case, HQ arranges the training) in the minds of participants will suffer worse. Our training will be seen a waste of time, and HQ will be perceived as 'anglo-centric', not internationally minded and not mindful of the needs of its people.

Whether you are actually delivering the training yourself, or managing its delivery by other trainers/presenters, there are five success factors of particular importance and sensitivity for successful multinational group training. Theses are: clear and considerate use of spoken English; effective visual projections and support material; sound discussion leadership skills; small-group exercises that are clear, linguistically suitable and culturally appropriate; individual attention and personal relationships.

Clear and considerate use of spoken English

To conduct training effectively with an international group of mixed native languages, using English clearly and considerately is a good start. I won't take too much space here going over ground already well-ploughed by other specialists in this area, but a few reminders are in order.

It is not enough, as a trainer or presenter, to politely and publicly acknowledge the fact that English is not the native language of many of those attending or to invite them to ask questions at any time if there is something they don't understand. It may, in fact, make for greater problems if the presenter feels that, having done their duty to be polite, they can launch into their familiar discourse at the usual pace.

The first and most basic aspect of the clear and considerate use of English with a multinational group is to ensure that you are clearly heard by all. This means being audible at the back of the room (or at the receiving end of a video conference), above the hum of the PC projector, above the whispers of the audience, above all ambient noise. Your NNES listener will otherwise find it much harder to follow you than would a native speaker.

Second, *slow down*! Presenters and trainers often begin with good intentions here, knowing that they should speak more slowly, but quickly resume their normal fast pace as they become engrossed in what they are saying.

Pace is, in fact, more crucial. Speakers need to pause, not only for emphasis, but also to give listeners a chance to think, reflect and process what is being said. They should also stop regularly, invite questions and wait. Remember, your Italian colleague may take a bit longer to put his question or opinion into a form that he can express than will your English or Australian colleague.

Third, be mindful of the stylistic elements of British English. The idiomatic expressions, ironic comments, the throw-away lines, jokes and indirect (to some ears) tone are part of a style and indeed a code that your British audience will

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probably understand. These will endear you to them and may provoke considerable British chuckles or repartee in return. Your non-British colleagues, on the other hand, may find this distracting, incomprehensible, or worse, unfunny. They will feel excluded from the discussion and anxious that they are missing something. As the repartee among the Brits in the group snowballs, the NNESs will start asking their neighbours if they can explain what's being said, while the trainer starts to wonder why some delegates are whispering to each other …

These three reminders are the foundation. If you, or the trainers you manage, don't have these abilities, acquire them.

Effective visual projections and support materials

This is another area where a considerable canon of good practice has already been published (and largely ignored!). But we need to remember one vital fact: an overhead (whether acetate foil or PC screen) projection dense with the text of what the trainer/presenter is simultaneously saying does not facilitate comprehension on the part of the audience. They are either listening to the speaker or reading the projected text. They cannot do both at the same time. If they're quick readers, they're ahead of the trainer. If they read more slowly than they orally comprehend, they're behind. NNESs can be either, depending on the means by which they learned English.

Keep your overheads clear and simple. Restrict content to key words and phrases only. This will also serve to make them more readable at a ➤

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distance. Rely on the clarity and pace of your delivery, as described earlier, to ensure that your audience pay attention to you and catch the main points of your message.

There is a place for more detailed text, figures and diagrams – in your written support material. If your NNES audience miss a point or two, they can refer to these.

At this point, as a professional trainer, you're saying: 'That's all very well, but my programmes contain very little lecture, and rely on participative group exercises and discussions for their effectiveness.' That's good to hear, because what follows concerns you.

> You need to keep a close and inclusive eye on your audience so that you can directly respond to non-verbal signs of confusion

Eliciting the full participation by NNESs in both plenary discussions and small-group exercises requires more than your vocal encouragement and the provision of opportunities. It takes sound discussion management (facilitation, if you prefer) and the right kind of exercise or discussion.

Sound discussion leadership skills

These are indispensable when conducting training for a multinational group. It is down to you to ensure that your NNES colleagues will be able – and allowed – 'to compete with their ideas'.

A clear and well-paced presentation will lay the groundwork. Your NNES colleagues who have lost the thread of the discussion and presentation are not likely to run the risk of embarrassing themselves by asking what they perceive to be 'stupid' questions. Other individuals of certain cultural backgrounds may not wish to embarrass the trainer by asking for repetition or clarification.

You need to keep a close and inclusive eye on your audience so that you can directly respond to non-verbal signs of confusion, or more importantly of a desire to speak. In addition, remember that not only may it be difficult for NNES participants to interject in the middle of a multi-party discussion dominated by native speakers, they may also find it inappropriate. This sort of competitive free-for-all discussion, in which contributors express themselves without waiting to be called upon by the head of session, or indeed without waiting for a colleague to have actually completed their utterance, may be considered by some as a very impolite way of carrying on and a dereliction of the leader's duty to manage the turn-taking.

> Take proper time for lunch, tea, drinks, dinner: British trainers hardly need advice on how to manage these

You must use all your basic skills of paraphrasing and summarising to ensure that your NNES colleagues have been given a full opportunity to express themselves, and that their questions or statements are fully understood by everyone else.

If you are managing or co-ordinating other trainers/presenters from the back of the room, then you must maintain the same vigilance. Where necessary, inject a comment or questions on behalf of NNES delegates to ensure that the trainer clarifies or repeats a point, or recognises a turn to speak.

Culturally-sensitive small-group exercises

The type of small-group activity/exercise or role-play that you plan is another factor. British (and American) trainers are very fond of 'ice-breaking' exercises to start a training programme. These often involve some form of self-disclosure, or talking about one's private or non-professional self. Many people from other cultures, however, find this sort of thing unnecessary and frivolous at best, and embarrassing at worst. I was recently working with a group of German management consultants who were baffled by this tendency on the part of their British HQ colleagues. One of them complained to me: 'What it there's no ice?' Indeed.

Remember too, that among many East Asians, it is considered extremely bad form to talk about oneself. Full stop. In deference to the 'teacher's' wishes, they will make a good attempt, but you are likely to have made your East Asian colleague more tense and anxious rather than less.

Role-plays – scenarios in which participants practice a communication event such as negotiation or performance appraisal – bring the language issue to the foreground. The basic rule of effectiveness here is that learners should be practising in the language that they will be using back on the job. If that is English – which might be the case, for example, where a Swiss German customer service manager appraises a French-speaking customer engineer – then fine. Otherwise, you risk inhibiting learning by compelling your NNES participants to try to get the language right as they to demonstrate the skills in which you've been trying to train them.

Be mindful, as well, of the composition of small groups or teams within the class. Your NNES delegates may feel less inhibited and more relaxed in smaller groups, but not necessarily. If you can, avoid groups numerically dominated by native English speakers. This can make a difference to

distance. Rely on the clarity and pace of your delivery, as described earlier, to ensure that your audience pay attention to you and catch the main points of your message.

There is a place for more detailed text, figures and diagrams – in your written support material. If your NNES audience miss a point or two, they can refer to these.

At this point, as a professional trainer, you're saying: 'That's all very well, but my programmes contain very little lecture, and rely on participative group exercises and discussions for their effectiveness.' That's good to hear, because what follows concerns you.

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people's anxiety or lack of it. A group of six consisting of four native English speakers may puts the NNESs at a 'disadvantage', as they see it. If, on the other hand, you have four NNESs and only two native speakers the chemistry may be different. (The same applies to the make-up of the entire class.)

My last suggestion on this topic is elementary: whatever your training exercises, make absolutely sure that your are clear as to your purposes, instructions and expectations.

Individual attention and personal relationships

Finally, your multinational training programme will greatly benefit from, and its success be assured by, the extent to which direct personal relationships and individual attention happen 'off-line'.

This means, first of all, that as the trainer or course manager, you need to establish direct one-to-one contact with your participants, especially the NNESs, after course hours, at lunch, at breaks. Invite their feedback, ask if they having difficulty understanding any aspect, ask for their opinions. They may well offer ideas and express useful points that they have hesitated to bring out in plenary session, perhaps for reasons noted so far throughout this article.

Second, and this is hardly a new or original idea on my part, take time to allow delegates to get to know and talk with one another. In other words, take proper time for lunch, tea, drinks, dinner – British trainers hardly need advice on how to manage these, but they will thaw more ice than all the games in the world.

A final word ...

In an effective multinational training event, your delegates will learn not only from your well-designed and delivered training programme, but also from the ideas, opinions, information and suggestions that they were able to exchange with colleagues from other regions. This type of opportunity is one of the joys of working for an international company. It is what attendees will often most remember about the programme, and what raises the esteem of your service in their eyes. Enabling a mulitinational group to learn and work together well in training may not be easy, but like many a difficult task, it offers to the trainer or training manager immense satisfaction.

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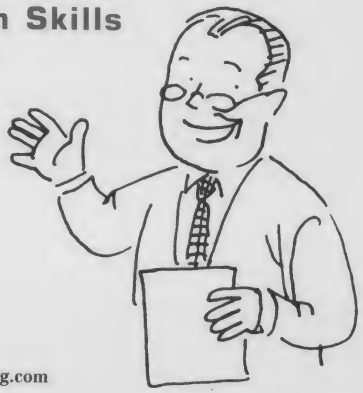

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Improving the job

Training is there to help people do a better job. So what does this require in practice? The first need, says **Dr Meredith Belbin**, is to realise what good performance in a job entails ...

Research shows that how people perform in a job is closely linked with how they interpret their role. Very much more could be achieved if people had a better understanding of roles. The reality is that there are three different types of role (professional, team and work) that a jobholder has to bear in mind (see Figure 1), and here the trainer can assist.

Role 1: the professional role

The first is the professional role. For some people the profession is the job. If you know your profession, you know your job. Professional and technical skills may comprise the core of a job and wherever this is the case, the training officer should be there to assist in professional development – by keeping an eye open for training courses and even work experience that can serve to refurbish or develop professional skills.

Few jobs stand still; that is why **job specifications** and descriptions are **so rapidly made obsolete**

However, it is rare for a job to be confined to its professional content. Other people will be involved at the boundaries or perhaps in areas where work territories overlap. Indiscretions or lack of insight into interpersonal relationships can destroy the value of a person's contribution at work. That is why team roles are so important.

Role 2: the team role

Team roles refer to the tendency to behave, contribute and interrelate with others in a particular way. There are nine team roles, each making a distinct contribution to the success of a team. These contributions are:

- co-ordinating the team's efforts (the co-ordinator)
- imparting drive (the shaper)
- creating ideas (the plant)
- exploring resources (the resource investigator)
- evaluating options (the monitor evaluator)
- organising the work (the implementer)
- following up on detail (the completer/finisher)
- supporting others (the team worker), and
- providing expertise (the specialist).

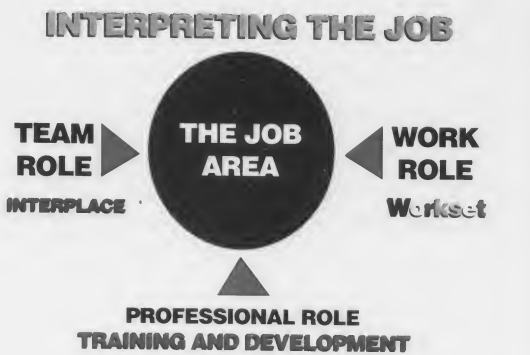
An understanding of team roles enables professionals to adjust to their jobs and each other. Preparation in the basic skills of teamwork by the trainer is paramount if professionals are to generate more value from their joint endeavours.

However, although team roles help the trainer to understand the contribution each individual is likely to make, *teamwork* itself, is also about *work*. How do the valued attributes that a person brings to the team relate to the work that is done within the team? How do the members relate to each other in any joint undertaking? How well is the team balanced for the nature of the assignment it is to undertake? A team can be perfect, but the output can be zero unless the jobs are set up in the right way. Here the third role must be borne in mind.

Role 3: the work role

The rate of change at work is now faster than it has ever been. Few jobs stand still. That is why job

Figure 1



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specifications and descriptions are so rapidly made obsolete. The alternative is to treat jobs as if in a continuous state of flux. Tasks and responsibilities change. Some need to be personalised and others shared. That is why the demands of a job need to be kept under continuous review. The language of work roles has been developed with that in mind.

Work roles refer to the mix of tasks and responsibilities undertaken by an individual and within a team. This new approach allows individuals and teams to analyse and improve the way in which they tackle their work. As team roles have become a means of communicating *inputs* to a job, work roles communicate the *demands* and the *output* of a job.

Clarity of job demands

Clarity in what the job demands is created using colour to distinguish between tasks and responsibilities, between individual and team work. The benefit is flexible work behaviour. More of value is delivered from the job. These concepts are now being deployed internationally where understanding of English words is often in doubt. Such understanding, we have learned, is often in doubt even among our own population!

These developments are being aided by the creation of software so that paperwork can be minimised and yet the continuously changing nature of jobs can be properly depicted. WorkSet is the software now developed to set up jobs, chart their progression and provide feedback on how a job is being addressed.

Improving output

By taking account of these three roles, the trainer can help individuals to improve the output of the job. Any job may be approached from each of these angles. Whichever approach is selected has a big bearing on what the job produces. Problems are liable to arise if jobs are viewed from a single standpoint to the detriment of the other two aspects. The risk is a loss of perspective in the way in which the job is conducted. Here the trainer can assist every person to consider his or her position from the point of view of these three forces. Through the use of technology, the trainer can

> An **understanding of team roles** enables professionals to adjust to their jobs and each other

identify imbalances between people and jobs, and can advise on how people can contribute more through a greater understanding of their role contributions. But in the end it is up to the trainer to take the process forward. Technology has its limitations – for ultimately, people need people and they usually learn best from each other.

Dr Meredith Belbin *is senior associate of the Institute of Management Studies in Cambridge and visiting professor in Leadership at Exeter. He is a partner in Belbin Associates, mainly known as producers of Interplace, a computer-based team role expert system used worldwide. Dr. Belbin invented, and is currently engaged in developing, Work Roles and its associated software, WorkSet. As an author his books include the widely read* Management Teams: Why They Succeed Or Fail *(1981),* The Job Promoters *(1990),* Team Roles At Work *(1993),* The Coming Shape Of Organization *(1996) and* Changing The Way We Work *(1997). He can be contacted at (tel) 01223 264975 or (email) belbin@belbin.com*

Fostering employee creativity: the key to

What exactly is creativity? How can it be nurtured in the workplace? And does it really help? **James Ogunleye** examines the questions and suggests some answers.

Much has been written and said about the IQ and Emotional Intelligence (EI) tests as important predictors of individual success in the workplace, and an increasing number of organisations are currently conducting such tests in an attempt to identify employee leadership traits.

Peter Storr's discussion on the pages of *Training Journal* in June 1999 will no doubt persuade many undecided minds in the industry of the need to invest in training related to 'people skills' – EI – to enable individuals to maximise their thinking capacity. It is a corporate strategy designed to remain competitive in the slippery terrain that is the international market.

> If anything, **creativity is** probably **needed more** in today's organisations **than IQ and EI**

But IQ and EI alone can not work in isolation of a key predictor of job success in the organisation – in other words, creativity. Indeed, if anything, creativity is probably needed more in today's organisations than the aforementioned duo. The 21st century is just shouting distance away. To enable a business to compete for, and maintain, competitive advantage in the widely predicted choppy waters, it will have to tap into the 'creativity, scholarly and enterprise' of its entire workforce and not just the gifted few.[1] In other words, a business will have to stretch the burden of innovative, strategic and divergent thinking – as thinly as it possibly can – among its employees.

Creativity defined

Increasing employee choice of tasks and participation in decision-making processes has been found to increase creativity in workplace.[2] But what exactly *is* creativity?

Well, it's an elusive function of Intelligence, which does not have a single definition. It is a complex, multifaceted and multidimensional process.[3] The diversity of creativity variables explains why terms like 'originality', 'innovation', 'imagination', and 'intuition' have, at various times, been used by subject experts and psychologists to describe it.

However, within the context of corporate management, it can be defined as the ability of a particular employee to use prior knowledge – gained either through life experience, college education or work training – to generate and combine ideas to improve efficiency, increase productivity and reduce business costs.

It is the originality and novel way in which such ideas are generated, combined and permutated that make creativity stand out from other achievement measures such as the IQ and EI.

None the less, there is a degree of correlation between Intelligence and creativity – although it has to be pointed out that a person who is highly intelligent is not necessarily (or automatically) highly creative.

A common vision

A recurring problem of corporate management is the mismatch between the vision of managers and that of the managed – a problem that is often not helped by the dichotomy of high-low, low-

job success

high ability testing. Frequently, it seems that managers are long on visions, but short on how to blend them with the available human resources. Hence, a large proportion of the workforce is excluded in the organisation's drive to push forward strategic and divergent thinking.

Such is the phenomenon of Intelligence testing that, as Daniel Goleman reports, many large companies now employ trained psychologists to develop competence criteria against which 'likely stars' in the organisation can be identified, trained and catapulted into the realms of leadership. It was Goleman's attempt to assess such competence that informed his latest work.[4]

Granted, not all employees can be leaders within their organisations, suffice it to argue that the job of the leaders might be more successful if the majority of employees were to be aided in developing their creative potential. After all, creativity is a trait that we all possess.

More important, investment in employee creativity will ease the pressure on many senior managers to achieve, because training in creativity would stimulate employees' impulse to sense and analyse problems, as well as to generate new ways to relate and synthesise work elements.[5]

The right environment

Creativity, like IQ and EI, must be nurtured and fostered if employees are to develop this trait. This means that the environment must be conducive; it also means that the institutional variables such as organisational structure, culture and ethos, and management attitude must be supportive. Above all, employees' (as well as managers') knowledge and talents must be harnessed to aid a new orientation in creativity. Both the employer and employees will thus be able to 'look for, and build upon, one another's talents and capabilities in innovative and co-creative teams'.[6]

One general function of a manager is to get things done through people, which they do by utilising the knowledge, skills and energy of their employees to achieve corporate objectives. But such a function can be rewardingly performed in an environment that fosters creativity in the maximum number of people, rather than in a selected few.

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Online learning: making your choice

Technological evolution has brought many advantages to the workplace and beyond. One exciting area is the increasing implementation of online learning. **Simon Hayward** explores the options available and the flexibility they present.

In 1997, 81 per cent of *Fortune 500* companies predicted using online learning. The previous year, in 1996, this figure was only 3 per cent. This year, 92 per cent of large US organisations are implementing some form of Internet or intranet network training (source: Masie Centre). While the US market for online learning is exploding, in the UK it's just being ignited. In 1998, 67 per cent of HR and training managers in larger organisations indicated a desire to use online learning over the next two years (source: BT).

Balancing the main factors

Many major UK organisations are currently developing their strategy for online learning. In our experience, they are seeking to establish the optimal balance of several factors:

- the right online learning environment in which people can learn effectively
- the right administration and management systems to organise and monitor learning
- the right media for delivering learning to each particular audience
- the right relationship between online and more traditional forms of training and development.

Fundamental to these strategic decisions is the type of distributed learning environment you wish to create.

Three types of distributed learning

There are three main types of distributed learning: anytime collaborative learning; sametime collaborative learning; and self-paced learning (see Table 1). A coherent strategy is likely to include all three types, appropriately combined for particular learning programmes. If, for example, you want to support team-based learning with project-based implementation in the workplace, a combination of 'anytime' and 'sametime' will achieve a powerful result. This would enable you to lead groups through learning materials and develop best practice examples as they work on assignments together. These examples could then be assimilated with the relevant knowledge database.

If, on the other hand, you want to punctuate a learning programme based on self-study with seminars, you could use regular 'sametime' events to bring students together to share experiences and review progress. The beauty of Internet- or intranet-based systems is that these people could be based anywhere in the world.

Administration and management

Whatever the balance of these three types of distributed learning, the underlying administration and management system needs to be integrated with the delivery environment. For example, individual progress needs to be tracked by achievement of learning and not simply by whether students have started or completed a particular development activity. To evaluate effectively, we need to know what they have learned, and how they are putting it into practice. In order to do this, we need a management system that can demonstrate where a student is up to regarding knowledge acquired, skills implemented and results achieved in the workplace.

Media

Your choice of media for a particular development project will depend on your objectives, your content and your audience.

Objectives related to knowledge transfer are often achieved through well-designed asynchronous or self-paced distributed learning. Where they relate to skills development, a combination of distributed and face-to-face practical work is likely to achieve optimal results.

Where you need to change hearts and minds, where you need people to change

Table 1: The three main types of distributed learning

- **Anytime collaborative learning** This is the most flexible type, with high reusability of materials, allowing any time, anywhere learning, with several levels of interaction for students in learning sets, whole course groups, and one to ones with tutors and colleagues.
- **Sametime collaborative learning** This is the closest we can get to a live classroom, to the 'event' experience, with audio and video conferencing support, small groups all logged on at the same time, sharing knowledge and learning.
- **Self-paced learning** This is the more traditional distance learning, focused on the individual, with high reusability of materials, but little interaction between students and tutors online.

their mental models, the power of face-to-face (of whatever form) will be a necessary component of the learning solution. But with team-based collaborative learning you can use online courseware to support and even catalyse this type of shift in thinking.

The right content is clearly important, but if you have a relatively sophisticated learner base and collaboration is likely to be an important part of the learning process, it may not be necessary to invest large sums in sexy multimedia.

Multimedia can be especially useful for induction, product training, and other forms of information transfer where the quality of visual image and a pre-determined learning process are important factors. It can also be especially effective and reliable for reaching large, mixed-ability groups.

But where we want people to think and learn together, simpler (yet still well designed) content can be as productive when combined with a collaborative environment such as Lotus Learning Space, where the emphasis is on team-based learning and applying that learning in the workplace.

Distributed learning requirements

So what sort of requirements should we set for our strategy? We have found there are several criteria for online learning environments and materials which organisations are placing at the top of their lists (see Table 2). These are driven by the fact that students have more control over their learning, and we therefore need to motivate them to choose to learn when they have many other demands on their time already.

Distributed or not distributed?

A big question for many organisations is the extent to which they want to implement distributed online learning: how to create the right relationship between distributed and more traditional forms of training and development. One option is to switch all (or at least the vast majority of) training and development into an online format. Another is to adopt a hybrid approach, combining distributed with face-to-face delivery.

The optimal approach will depend on the content and the audience. The following are just some of the factors that need to be considered.

All distributed

- Needs great design and facilitation to engage with each learner.
- Needs obvious links to the key business drivers of the organisation.
- Needs explicit link to performance management, so that individuals know the significance of the learning.

Hybrid

- Need to use face-to-face where it has most effect – when you want to affect hearts and minds.
- Needs clear delineation between the online and the face-to-face, so that students value both.
- Can be more expensive, but often leads to richer learning solutions.
- Needs and supports a focus on implementation.
- Also needs obvious links to the key business drivers of the organisation.

Table 2: Criteria for online learning environments and materials

- **Engaging** This needs good design, exploiting the opportunities for giving students a collaborative experience, and effective facilitation of the learning process.
- **Relevant** This means that learning must be timely and driven by business needs, include practical assignments and be seen to be building the organisation's core competence; otherwise the learning is likely to be side-lined.
- **Ease of access/user friendliness** This implies web browser or intranet access, an intuitive learner interface with readily available support and using appropriate media for each audience.
- **Flexible options** We need to cover all three types of online learning: synchronous, asynchronous and self-paced.
- **Scaleable** This implies that it is easy to expand the portfolio/audience, that we have an effective administration system, that we have technical headroom for growing the numbers of courses and students, and that we ensure maximum reusability of materials.
- **Open** Using a standards based environment, with open access to materials, web hosting, content and so on, linking varied providers to meet each organisation's needs.

Simon Hayward *is a director of Ellis Hayward Consulting, a leader in distributed collaborative learning and a Lotus Advanced Business Partner. Simon works in partnership with a range of leading organisations to help develop sophisticated, holistic learning solutions. An experienced facilitator and expert in management development, he has degrees from Oxford University and Manchester Business School, and has held a variety of senior management roles. He can be contacted at (tel) 01625 540540 or (email) simon.hayward@ellishayward.co.uk*

Hybrid solutions are often based on surrounding face-to-face events with distributed learning focused on pre-required learning and post-event implementation support.

The trade-off between face-to-face and distributed learning will often be between cost and effectiveness. Siemens Virtual University in the States cites a 90 per cent cost reduction while maintaining 90 per cent effectiveness when training sales engineers in a distributed learning environment (Lotus Learning Space). You could reinvest the money you save in a targeted face-to-face learning activity to create a comprehensive learning solution.

What benefits should you expect?

The types of benefit that organisations are attributing to online learning include the fact that learning becomes more directly relevant to the workplace, leading to improved business results. Additonally, there's increased collaboration in learning teams, reduced costs (including less total time away from the job, less travelling costs and increased reusability of materials) and a significant contribution to knowledge management through the development of best practice in relation to each area of learning. On top of that, there's use of a process that is more flexible and more 'learner-centred', which leads to students taking more responsibility for their own development. Finally, learning and improvement through clear assessment and feedback can be tracked, with increased support for learning and implementation.

Where you derive benefit will depend at least in part on where you invest. The more appropriate your strategy for your organisation's business reality, the more the benefits are likely to stick.

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If, on the other hand, you want to punctuate a learning programme based on self-study with seminars, you could use regular 'sametime' events to bring students together to share experiences and review progress. The beauty of Internet- or intranet-based systems is that these people could be based anywhere in the world.

Administration and management

Whatever the balance of these three types of distributed learning, the underlying administration and management system needs to be integrated with the delivery environment. For example, individual progress needs to be tracked by achievement of learning and not simply by whether students have started or completed a particular development activity. To evaluate effectively, we need to know what they have learned, and how they are putting it into practice. In order to do this, we need a management system that can demonstrate where a student is up to regarding knowledge acquired, skills implemented and results achieved in the workplace.

Media

Your choice of media for a particular development project will depend on your objectives, your content and your audience.

Objectives related to knowledge transfer are often achieved through well-designed asynchronous or self-paced distributed learning. Where they relate to skills development, a combination of distributed and face-to-face practical work is likely to achieve optimal results.

Where you need to change hearts and minds, where you need people to change

Table 1: The three main types of distributed learning

- **Anytime collaborative learning** This is the most flexible type, with high reusability of materials, allowing any time, anywhere learning, with several levels of interaction for students in learning sets, whole course groups, and one to ones with tutors and colleagues.
- **Sametime collaborative learning** This is the closest we can get to a live classroom, to the 'event' experience, with audio and video conferencing support, small groups all logged on at the same time, sharing knowledge and learning.
- **Self-paced learning** This is the more traditional distance learning, focused on the individual, with high reusability of materials, but little interaction between students and tutors online.

their mental models, the power of face-to-face (of whatever form) will be a necessary component of the learning solution. But with team-based collaborative learning you can use online courseware to support and even catalyse this type of shift in thinking.

The right content is clearly important, but if you have a relatively sophisticated learner base and collaboration is likely to be an important part of the learning process, it may not be necessary to invest large sums in sexy multimedia.

Multimedia can be especially useful for induction, product training, and other forms of information transfer where the quality of visual image and a pre-determined learning process are important factors. It can also be especially effective and reliable for reaching large, mixed-ability groups.

But where we want people to think and learn together, simpler (yet still well designed) content can be as productive when combined with a collaborative environment such as Lotus Learning Space, where the emphasis is on team-based learning and applying that learning in the workplace.

Distributed learning requirements

So what sort of requirements should we set for our strategy? We have found there are several criteria for online learning environments and materials which organisations are placing at the top of their lists (see Table 2). These are driven by the fact that students have more control over their learning, and we therefore need to motivate them to choose to learn when they have many other demands on their time already.

Distributed or not distributed?

A big question for many organisations is the extent to which they want to implement distributed online learning: how to create the right relationship between distributed and more traditional forms of training and development. One option is to switch all (or at least the vast majority of) training and development into an online format. Another is to adopt a hybrid approach, combining distributed with face-to-face delivery.

The optimal approach will depend on the content and the audience. The following are just some of the factors that need to be considered.

All distributed

- Needs great design and facilitation to engage with each learner.
- Needs obvious links to the key business drivers of the organisation.
- Needs explicit link to performance management, so that individuals know the significance of the learning.

Hybrid

- Need to use face-to-face where it has most effect – when you want to affect hearts and minds.
- Needs clear delineation between the online and the face-to-face, so that students value both.
- Can be more expensive, but often leads to richer learning solutions.
- Needs and supports a focus on implementation.
- Also needs obvious links to the key business drivers of the organisation.

Table 2: Criteria for online learning environments and materials

- **Engaging** This needs good design, exploiting the opportunities for giving students a collaborative experience, and effective facilitation of the learning process.
- **Relevant** This means that learning must be timely and driven by business needs, include practical assignments and be seen to be building the organisation's core competence; otherwise the learning is likely to be side-lined.
- **Ease of access/user friendliness** This implies web browser or intranet access, an intuitive learner interface with readily available support and using appropriate media for each audience.
- **Flexible options** We need to cover all three types of online learning: synchronous, asynchronous and self-paced.
- **Scaleable** This implies that it is easy to expand the portfolio/audience, that we have an effective administration system, that we have technical headroom for growing the numbers of courses and students, and that we ensure maximum reusability of materials.
- **Open** Using a standards based environment, with open access to materials, web hosting, content and so on, linking varied providers to meet each organisation's needs.

Simon Hayward is a director of Ellis Hayward Consulting, a leader in distributed collaborative learning and a Lotus Advanced Business Partner. Simon works in partnership with a range of leading organisations to help develop sophisticated, holistic learning solutions. An experienced facilitator and expert in management development, he has degrees from Oxford University and Manchester Business School and has held a variety of senior management roles. He can be contacted at (tel) 01625 548540 or (email) simon.hayward@ellishayward.co.uk

Hybrid solutions are often based on surrounding face-to-face events with distributed learning focused on pre-required learning and post-event implementation support.

The trade-off between face-to-face and distributed learning will often be between cost and effectiveness. Siemens Virtual University in the States cites a 90 per cent cost reduction while maintaining 90 per cent effectiveness when training sales engineers in a distributed learning environment (Lotus Learning Space). You could reinvest the money you save in a targeted face-to-face learning activity to create a comprehensive learning solution.

What benefits should you expect?

The types of benefit that organisations are attributing to online learning include the fact that learning becomes more directly relevant to the workplace, leading to improved business results. Additionally, there's increased collaboration in learning teams, reduced costs (including less total time away from the job, less travelling costs and increased reusability of materials) and a significant contribution to knowledge management through the development of best practice in relation to each area of learning. On top of that, there's use of a process that is more flexible and more 'learner-centred', which leads to students taking more responsibility for their own development. Finally, learning and improvement through clear assessment and feedback can be tracked, with increased support for learning and implementation.

Where you derive benefit will depend at least in part on where you invest. The more appropriate your strategy for your organisation's business reality, the more the benefits are likely to stick.

Netcheck

Would you pay to visit a site on the Net? **Clare Forrest** examines one such location and assesses whether the cost justifies the information that can be accessed.

Wind up your computer and point your browser at www.facilitationfactory.com While there is nothing particularly extraordinary about this site it is interesting in that it is attempting to make a go of ecommerce on what is essentially a company marketing site for the management consultancy arm of Calian, a Canadian-based communication and technology company.

I have my doubts about how successful the company is likely to be, as I am not at all convinced that what it is providing is particularly new or exciting. However, if it works for the group it has found a useful way of supplementing its consultancy income and, probably, of ensuring that at least this website breaks even. If you search on Calian's main site at www.calian.ca the latest news release at the time of writing makes it clear that the company is investing heavily in its ebusiness unit.

Calian, if you haven't heard of the company – and I hadn't – says it ranks in the top 15 professional service organisations in Canada. It does not, incidentally, say what its ranking is; 15 perhaps? What of the FacilitationFactory itself? What does it provide and what do you get for your money?

As you enter the site you are informed, rather grandiosely and with no regard for the usual use of nouns and verbs, that the FacilitationFactory is a 'central location for tools and techniques … our vision is to have thousands of facilitators … a professional community of people who want to share their experiences in order to leverage each other …'

Click again and you discover that for an annual fee of Canadian $99 – about £40.50 (go to www.xe.net/ucc/ for an excellent currency converter) – you have 'unlimited access to "The Source" and all of its supporting materials, membership in (sic) a community which has the advancement of facilitation and facilitative techniques as a common objective, unlimited access to the Break Out Groups for discussion with other experts, the opportunity to submit material for certification and entry into "The Source" in the support of the art of facilitation.'

Let me translate this for you. It means that you pay an annual fee for which you can:

- access materials from the database they call 'The Source'
- add materials to this database.

The 'unlimited access to the Break Out Groups' is a free part of the site and simply amounts to chat rooms and bulletin boards. Clever name though.

At this point you're probably thinking that every site you've ever visited allows you to do these things, and more, for free. And you'd be right. I really don't know whether to applaud this site for its entrepreneurism or bemoan it as being the thin end of the wedge. As a clever come-on, though, the FacilitationFactory says that for every ten subscriptions it will donate a full subscription to a not-for-profit – that is, charitable, voluntary or public service – organisation.

> **Time is money** on the Net and designers ought to use this as their maxim

Thankfully, there is a trial area – although I suspect that once trawled many will not bother to sign up. All the information in 'The Source' has been categorised by what Calian calls session objectives to give you a 'fuller package of complimentary resources that you can pass along to your clients'.

Funny, I thought 'complimentary' meant 'free' – yet you can't access the majority until you've paid up.

For those of who want an in-depth look at 'The Source', you are offered a free 24 hour full-access trial. In return you have to provide the usual details about yourself, which may mean more junk mail and certainly means that you're on somebody else's marketing database.

It's hard not to be put off by the James Bond-like figure wielding a tennis ball wrapped in a piece of carpet (well, that's what it looked like to me) who greets you as you access 'The Source', but persevere. As a side issue, though, I do find it annoying that when you hit a link button it – often very slowly – takes you to a welcome page, which you then have to click on again to get where you thought you were going in the first place! Time is money on the Net and designers ought to use this as their maxim.

For some reason, most of the illustrations on the site are similarly strange, though of excellent quality. Men doing daring things (tightrope walking, surfing) while carrying briefcases and wearing suits is a common theme. Women are notable mainly for their absence.

Back to the session objectives. I'd call them words and I'm not being picky – 'action' and 'conflict resolution' to name but two examples do not qualify as objectives. However, it must be said that the database has been well put together and can be searched in a number of different ways as outlined below:

- facilitation concepts
- resources
- homework exercises
- interview questions
- quotes, and finally
- workshop exercises.

Unfortunately, the quality of some of the information is either facile or questionable and, since I was presumably being given access to showcased material, this seems unfortunate. For example, the definition I obtained on 'team' was that a team is:

… a small group of people (2–25) with complementary skills who are committed to a

Clare Forrest *would be pleased to know by snail-mail, email or carrier pigeon the URLs (web addresses) of any sites that you have enjoyed, loathed or just find plain indispensable so that she can bring them to everyone's attention. She can be contacted at (email) CForrest@bigfoot.com*

common purpose, performance goals and approach for which they hold themselves mutually accountable. The complementary skills which team members must have can be grouped into three categories: 1) technical or functional expertise; 2) problem-solving and decision-making skills; 3) interpersonal skills. In cases where teams consist of members with highly diversified skills and experiences the role of the team leader is raised in level of importance. It is the team leader's role to ensure communication within the group is maintained at an optimal level and to provide overall direction. Communication is the linchpin to creating the synergy that high performing teams normally exhibit.

Who'd 'a thought it?

The section of interview questions is rather bizarre in that the index shows the question, then the link simply repeats the question. I had a look at a large number of the exercises and felt that there was very little there that I hadn't seen before. Of course, if you haven't already got a stock of 'exercises for every occasion' then this might be useful, especially as you can instantly download a Word document with the exercise you want to keep – providing you're using Word of course.

Throughout my trawl I was constantly able to access information that I wasn't supposed to have on the free trial. For example, I found an exercise on closing groups and reviewing learning which used Edward de Bono's 'red hat' idea. Very nice for me, but not so good for the site owners and its paying members.

Rather poorly, I also kept finding some unforgivable spelling mistakes, which on the paying part of the site is not good enough. Two in particular that sprang out were 'facilitiation' and 'questionning'. You'd think at least the first would be right given the name of the site.

The free parts of the site provide the usual articles, free e-zine and links. Annoyingly, many of the articles in the 'Magazine Rack' offered no indication of

> Funny, **I thought 'complimentary' meant 'free'** – yet you can't access the majority until you've paid up

authorship, which makes it extremely hard to assess their credibility. My suspicion is that most, if not all, are written by members of Calian.

In design terms, with the expectation of irritating mouse clicks that don't really take you anywhere useful, the site is excellent and very easy to find your way around. It also loads pretty speedily.

Ratings	
Content	★★
Originality	★★★
Navigability	★★★★★
Links	★★
Presentation and graphics	★★★★
Downloads and freebies	★★★

Orange is the predominant background colour with a very clear white, shadowed text for headings and links, and straightforward black text otherwise. There are a lot of frames, which will be very annoying for non-frames users; I couldn't find a non-frames version.

Overall, I can't really recommend this site. There is so much good quality free stuff on the Net that something has to be extra good to justify the charge, even one as low £40.50 a year. If you are interested in facilitation then I would suggest that Roger Greenaway's site at www.reviewing.co.uk offers much more and costs nothing. ***CF***

Quick hits

www.learningbuzz.com
★★★
This is Peter Honey's site for learning. Although the design is a little cluttered there is some good stuff to be found here, as you would expect, and it has the potential to be a great resource for learning about learning.

www.thehungersite.com
★★★★★
You may well have come across this already as it has received a lot of publicity, but it's well worth another plug. By visiting the site once a day and clicking on the hunger button you automatically donate a meal to a hungry person. This is so easy and so worthwhile that we should all make this the opening page for our browsers so we can't forget. The site is looking for sponsors too, so corporate readers of this column might like to take a look at this – it seems to be a very cost-effective and marketing-effective way of contributing
to charity.

www.HRfree.com
★★★★
This is a new on-line community for human resource professionals by human resource professionals. It's a free site to 'encourage the exchange of ideas, stimulate discussion and provide one-stop shopping for all the needs of HR professionals'. Although currently mainly US-based it is genuinely trying to operate worldwide and is worth a look. It certainly, to my mind, offers far more than the FacilitationFactory.

Training Resources

A round-up of **new and recently released** training resources.

• MULTIMEDIA

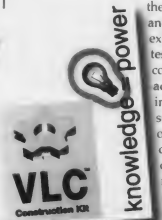
A new interactive DIY multimedia solution for training and communications in the workplace

The *Virtual Learning Centre™ Construction Kit (VLCCK)* is a revolutionary new training tool, which aims to alter the nation's approach to training and education. Launched by knowledge = power (k=p), it provides a software framework for constructing bespoke training courses. The *VLCCK* enables training and educational establishments to maximise their resources by increasing the reach and productivity of their trainers and tutors, with minimum effect on technical standards.

Available via CD-ROM or intranet, the *VLCCK* is a software framework, which provides a resource for building bespoke solutions in a virtual environment. This passes control direct to the tutor and ensures applications can be configured quickly and accurately, as well as updated on an ongoing basis with minimal additional expense.

The *VLCCK* is based on a system called the Virtual Learning Centre or VLC, the interface for all of k=p's existing multimedia courses. The VLC is an easy-to-use virtual reality building, which structures learning in the same way as traditional classroom situations. The reception is the building's first room, which orientates users by providing welcoming and introductory material and provides access to all other rooms.

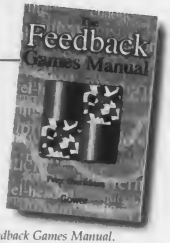
The building offers various combinations of rooms to serve specified purposes within the study process – a classroom and library for study, games and exam room where employees test their knowledge and a communications room for access to the Internet or intranet. Within each room, students interact with ordinary objects such as books, computer and other familiar devices to access learning materials. Measurement tools are embedded within these interactive devices to monitor students' progress.



For further information visit (website)
www.knowledge-power.com/vlcck

• EXPERIENTIAL MATERIALS

The Feedback Games Manual



Peter Gerrickens' *FEEDBACK GAME*, launched worldwide in March 1999 by Gower, has sold over 10,000 copies in the original Dutch language edition. Such is its growth in popularity (it is now used by an estimated 50 per cent of trainers and 75 per cent of higher education establishments in the Netherlands) the author has developed *The Feedback Games Manual*.

The manual is, in part, a collection of 20 ways of playing the original game, many of them developed with the help of the thousands of trainers and educators who were using the game.

It uses a variety of techniques (and supplementary exercises) such as the Johari Window, Neuro-Linguistic Programming and Transactional Analysis. These techniques are used to explore the author's ideas on feedback and help both to develop people's conscious and latest strengths, and to transform those areas that they may have identified as their weaknesses.

The 20 games in the collection are designed to be used in a wide variety of situations including training courses on team development and interpersonal skills; team meetings; appraisals; coaching and counselling sessions.

To order direct contact Bookpoint Ltd at (tel) 01235 827730.

• ONLINE LEARNING

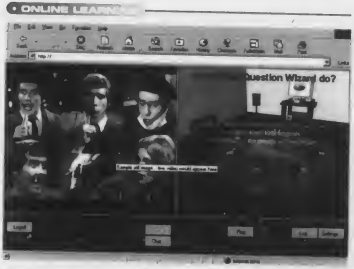
Significant upgrade of market leading authoring tool

Asymetrix Learning Systems, Inc. have announced the availability of ToolBook II Instructor 7.1. Version 7.1 represents the next generation release of the market-leading online learning authoring product used by professional developers, programmers, instructional designers and trainers to create compelling, web-delivered courseware.

Regardless of the distribution method – the Internet, an intranet, a local area network, or CD-ROM – Instructor 7.1 helps organisations and developers deliver advanced online learning lessons whenever and wherever they are needed.

'With the release of Toolbox II Instructor 7.1, our customer base will appreciate the added ease of use through our new Actions Editor, and added functionality through our support for native web technologies such as DHTML and XML,' says Peter Kelly, managing director of Asymetrix Learning Systems Europe.

Toolbox II Instructor 7.1 is priced at £1,595 for first time purchases. For further information contact Asymetrix Learning Systems at (tel) 0171 345 1500.



IML launches web-based MultiSite II

MultiSite II is the world's first flexible multi-discipline learning system that can be delivered over the Web, intranets, business television (BTV), through video conferencing or by local tutor from a desktop PC.

The system recreates the advantages of the teacher-led classroom over a network of multiple sites. Home, office or class-based individuals, equipped with PCs or cordless keypads, can speak to their instructor and interact with training or presentation materials – individually and as a group.

MultiSite II also paves the way for a comprehensive internal communications network – a two-way channel for broadcasting information, motivating workgroups and allowing employees to add their voice to decision-making.

It comprises four main elements: the studio-based presenter control; remote keypad controller; keypads or PCs; and QuestionWizard authoring software.

For further information contact Sylvia Ewing at (tel) 01428 727476.

New training package on team leadership

Daedal Training has just released its latest off-the-shelf Training Session Package *The Team Leader's Role & Skills*. The package covers: the behaviour and qualities of a good leader; the changing role of a leader in a modern organisation; influences on a leader's style; adapting the style to the circumstances; sources of leadership power; and the skills needed to be a successful leader.

It is provided with electronic masters for participants' material in MS-Word 97. This allows trainers to amend the material to suit their own organisation's needs. Overhead transparencies are provided in the form of PowerPoint 97 presentation slides that can also be printed out in black and white or colour.

This package is priced at £145 + VAT and is available from Daedal Training at (tel) 020 8467 8220.

Innovative web-based training delivery system

nettrain.co.uk. Ltd has launched nettrain Milestone, believed to be the first system to provide an individually tailored and cost-effective means to deliver training on a global basis, and accurately measure the time and costs involved.

In nettrain's analysis of various industries, such as the car industry, they found that despite having invested over £400 million in training, personal productivity or levels of customer satisfaction had not measurably improved. nettrain Milestone was developed specifically to increase learning levels and measure results.

nettrain Milestone monitors the progress of each individual delegate while automatically adjusting, customising and delivering the course material specifically for that one individual through its Doubleback technology. Every time a delegate 'logs on' for a training session, the system knows what stage has been reached and provides the relevant material.

As nettrain Milestone is web based it enables study to take place at the pace to suit the student at any time anywhere in the world. Benchmarks can be set for groups or individuals based according to an organisation's own criteria or external standards.

At £15 per hour, any user can fully access nettrain Milestone globally and only be charged for their time on the system. For further information contact nettrain at (tel) 01234 756047 or visit (website) www.nettrain.co.uk

• REVIEW

Making Teams Work

Gower, 1999.
Gower House, Croft Road,
Aldershot, Hampshire GU11 3HR
Tel: 01252 331551
Website: www.gowerpub.com
Video (13 minutes) £120 each or £108 when buying 10 titles from the series; all 64 series titles available at £6,500 (all prices exclude VAT)

This is one of an eventual series of 64 titles being drip-released under the banner of 'Learning à la Carte', produced by Ash Quarry and distributed in the UK by Gower.

The format of all titles would appear to be the same: Australian business psychologist Peter Quarry interviews international contributors on topic related to their expertise.

In this case the contributor is Dr Edward Hubbard, head of an international management and organisation development consulting corporation, and a former professor and director at Ohio State University.

Following a classic definition of a team – more than one person working towards a common goal – the discussion ranges over a fairly predictable set of teamwork/leadership issues:

- *individual vs team performance*, reference being made to 'various studies' purporting to prove that team performance outshines that of individuals
- the various different *types* of team typically utilised by organisations
- approaches to *leading the team*, focusing on the transfer of authority to create empowerment, including the rationale that 'leading doesn't always mean being out front'
- *the need for teams to be fluid* according to the challenge set, with a timely reminder that teams are not a panacea for all business ills
- the key *desirable characteristics of team members* – leadership, problem solving, analytical ability and followership
- finally, looking to the future, the advent of *the virtual team* via technology.

Quarry is undoubtedly a seasoned interviewer, and Hubbard a fluent and plausible speaker. However, there is disappointingly little that is new or exciting in this offering. Indeed, much of this dialogue seems anchored in historical thinking: have we made no discernible recent progress in our analysis of teams? All of which begs the question: how should a resource such as this be used?

While the publicity flier suggests that it provides 'a concise but authoritative introduction to the topic', this title is little more than a taster, with no real indication of its target audience. The problem of its application might have been less had the producers seen fit to include some sort of briefcase booklet or support material but, unusually, there is none. In the absence of any such guidance, it falls to the enterprising trainer/facilitator to make of it what they might, within whichever context they may choose to use it.

Despite its attractive pricing options, there are better – and more interactive – ways of investing in 'team' thinking and development than is the case here. While it would be harsh to judge the entire series on the basis of a single title, this fare appears more *table d'hôte* than *à la carte*. **RG**

Ratings

Content and structure	**
Support material	*
Overall effectiveness	**

Rob Goodwin FIPD is the principal of SELECT Management Training & Consultancy. He can be contacted at (tel) 01234 365693.

• REVIEW

Interactive Directory of Learning Resources (third edition)

Compiled by Alun Harvey of Open Mind

Gower, 1999. Gower House, Croft Road,
Aldershot, Hampshire GU11 3HR
Tel: 01252 331551 Website www.gowerpub.com
ISBN 0 5660 8249 7
Two 3.5 inch boxed disks
(plus a demonstration disk) £85 + VAT

The first edition of this resource appeared in September 1997, the second in September 1998, and both were reviewed very favourably in (what was then) *Training Officer*. This latest edition is in the same format but brings the resources up to date and increases the listing to 6,200 learning resources from 140 publishers and producers available in the UK.

The resource, which is a PC-based guide, enables users to locate descriptions of the resources in a broad-based range of 20 subjects based on over 200 topics by title, medium, level, duration, price, publisher and a brief description of its content, with a simple 'print from screen' facility.

The contents include such topics as communications, computer skills, personal skills, team working, training and development. The Directory covers resources such as CD-ROMs, CDIs, computer-based training products, open learning programmes, training videos, audio tapes, games, activity manuals and business books.

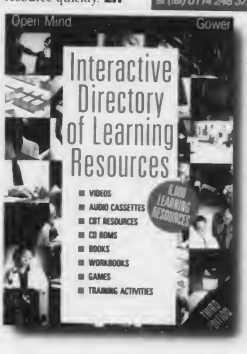
A free demo disk with limited entries covering 236 products is included in the resource pack. The demo disk can be used before opening the main part of the pack to check whether the product comes up to expectations. If it does not, under a no-quibble guarantee, the unopened Directory can be returned.

This is a most useful resource for practitioners needing to locate the right training resource quickly. **LR**

Ratings

Structure	*****
Innovation	*****
Content	*****
Usability	*****
Overall effectiveness	*****

Leslie Rae, of Elday Associates, can be contacted at (tel) 0114 248 3725.



Explore Your Values

Peter Honey

Peter Honey Publications. 1999
Tel: 01628 633946
Email: peterhoney@peterhoney.co.uk
ISBN 1 9028 9901 6
A4 ringbinder £165 plus £4.50 p&p

The announcement that a new Peter Honey collection of self-analytical instruments is due for publication is always of exceptional interest and when my copy arrived, once again I was not disappointed.

Peter comments that people are stuffed full of more values, attitudes and beliefs than they realise, these acting as filters affecting the way they see the world, react and behave. He suggests that they have a nasty habit of becoming stubborn, self-fulfilling prophecies – for example, all red-headed people are quick-tempered, so you immediately treat them as such – but, having learnt that they are malleable can be modified for the better. The collection of checklists is intended to show users how to surface, scrutinise, select and share their values, attitudes and beliefs, initially as self-awareness instruments, but ideal for sharing in a group or team situation. The checklists are preceded by suggestions for their use in half-hour or full-hour slots.

The collection of 13 checklists starts with a warm-up exercise of 40 paired preference statements that obviously owes much to the long and self-established 'learning styles' questionnaire. The purpose of this instrument, in addition to warming-up, is to start users on the path of identifying and articulating their values, attitudes and beliefs. The 12 principal checklists range from values and beliefs about attitudes and behaviours, continuous improvement, and creating a learning organisation; through influencing, learning and development, and mistakes; to responsibility, accountability, and strategic thinking and planning.

Each checklist contains from ten to 12 statements, which users may or may not believe about the topic. For example, in 'Mistakes' the first statement is: 'I believe most mistakes are caused by carelessness and/or ignorance' – users either ticking or crossing according to whether they believe/don't believe. The checklists are followed by scoring keys, which can be compared with other users' comments or with a set of 'Peter Honey's comments' on each item. These include a recommended response, comparison with which can be used to initiate discussion on the topic. Users are then directed to consider their responses and the comparisons, and plan to make modifications as necessary and desirable.

This collection is essential in helping yourself or groups of learners to understand their values – an essential knowledge particularly in interpersonal, interactive and a wide range of people situations. Very well recommended. ***LR***

Ratings

Clearly defined learning objectives	★★★★★
Variety and approach	★★★★★
Handouts and overheads	★★★★★
Trainer guidance	★★★★★
Universal practicability	★★★★★
Overall value	★★★★★

Creativity for Competitive Advantage

Chris Carling

Fenman, 1999. Clive House, The Business Park, Ely, Cambs CB7 4EH
Tel: 01353 665533 Email: service@fenman.co.uk Website: www.fenman.co.uk
A4 ringbinder, £195 plus carriage

This new collection of activities returns to a frequently used theme of creativity, but instead of the usual fairly straightforward simple creativity puzzles and processes, this author relates creativity processes directly to a range of business situations. Many learners attending training programmes that include creativity sessions customarily enjoy these sessions, but frequently fail to implement them because the sessions don't relate the processes to their own world of work.

The relationships, grouped in four parts, include:

- using creativity to gain a competitive and innovative edge
- creativity specifically concerned with problem solving
- using creativity in dealing with people in communication and team situations, and
- methods of increasing one's own personal creativity.

The collection contains 19 activities, each following the pattern of what the activity is about, its purpose, approximate timing, materials needed, resources provided (handouts, OHP slide masters), an overview of the activity, and how to prepare and use it.

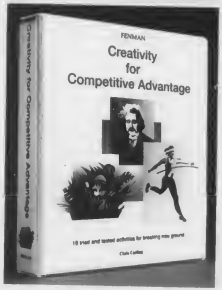
The activities are self-standing for use in a wide range of training programmes, but can also be grouped in associations. Advice is given for this latter process in each activity, suggesting relationships of that activity with others.

The activities and their resources are clearly written and laid out, and many are accompanied (as OHP slide masters) with humorous and relevant cartoons. The content is more than a simple 'here's an activity for you to use'; rather, it's a mini-session on the subject containing at least one, and frequently several, supporting activities. For example, Activity 5 'Choosing winners' starts with an introduction to the concept of the right person for the job and a grid approach to comparing information. Then it describes the grid approach using a case study, sets a group activity for the learners to practise using the approach, and a group activity considering gut feelings and intuitive thinking. Finally, there's a discussion, a paired activity and an individual exercise based on force field analysis.

I recommend this collection to any trainer who needs/wants/has to include material on this subject in their programmes and requires a more specific type of approach to creativity. ***LR***

Ratings

Clearly defined learning objectives	★★★★
Variety and approach	★★★★
Handouts and overheads	★★★★
Trainer guidance	★★★★
Universal practicability	★★★★
Overall value	★★★★



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A hidden agenda?

Andrew Mayo challenges whether the rationale behind training and development is often more a case of HR pursuing a pet project under the guise of being 'good for the organisation'.

I recently worked with an HR team on determining their strategy for the year ahead. They had looked at the business plan and it included the 'need for organisational excellence'. This they took as the link to a number of HR initiatives. I say 'link', although in reality it could be called a rationale for what they wanted to do anyway.

Later on, as they considered action plans, under their performance management initiative appeared 'make business case to top team and sell it'. I reflected on why one would have to sell an initiative on performance management. One would think that senior managers would have a considerable vested interest in such a subject!

Certainly they would have had performance goals and a desire to achieve them. But probably they had not asked for the complex competency-based, three-meetings-a-year approach that HR were going to propose, albeit that it represented 'best practice' professionally. It may well bring great benefits to the organisation, but it raises the question: 'Whose agenda are we working to?'

It has seemed to me, and I have certainly been personally guilty in this respect, that we may say the words about being business linked but, in fact, often we look for rationales to pursue our own pet projects and interests, convinced meanwhile that they will be ultimately good for the organisation.

I am sure this is particularly true when it comes to training and development. Great leaps of logic are taken from business problems/issues/goals to get, first, to training-based solutions, and then often the ones we feel comfortable with. They are likely to be on the softer side, since this is where the comfort zone of most trainers is today. Leadership development, team building, self-awareness, coaching and so on – for these, creative and enjoyable learning methods have been derived, and participants generally feel they have been helped at the end of them. Since most people do experience some personal growth through these events, it would be argued that there must be an indirect spin-off for the organisation.

> We may say the words about being **business linked** but, in fact, often we look for rationales to pursue **our own pet projects and interests**

The problem is that the solution may not be a training one, and there may be more direct ways of achieving benefit. In another recent experience I was asked to advise on the contents of a communication skills course. When we went right back to those invaluable seven words 'What problem are we trying to solve?', we realised that there were cultural and environmental issues in the communications climate that would never be solved by skills training.

Furthermore, each potential attendee had quite different learning needs, and the starting point needed to be an assessment of each person's existing capability and motivation to change. A mere 'sheep-dip', as so often happens, would have achieved little – but it fitted the standard pattern of the training department.

In the case referred to in the first paragraph, actually the over-riding business priority was to raise productivity, since this was well behind competition. Perhaps this was not seen as HR's problem, although it would be hard not to see focused recruitment, training, leadership effectiveness, rewards and incentives, motivation and so on as not being contributors to productivity improvement.

It raises the immediate question as to how the links are made from such a broad goal down to the definition of relevant learning objectives. This requires a simple but thorough series of questions, which work backwards from the desired end-point through the factors that influence it, and then asking how people capability or people policies may make the difference. Often we will find the answer is not a training solution at all.

Many years ago I had a book called *Analysing Performance Problems* by Mager (yes, that one) and Pipe. It always impressed me with its range of reasons *why* people might not be performing as hoped. (As luck would have it, I found a copy in the USA this year.)

Many learning events that are aimed primarily at personal development or external employability might be properly categorised and budgeted under 'employee benefits'. We do not need to convince ourselves of tenuous links to the business but can be honest about our learning goals and consequent measures of success.

For those whose job it is to provide their organisation with the right people ready with the right capability at the right time – a vital and strategic task – then their starting point should be the agenda and objectives of the teams they support. Even if they *are* mainly numbers ... for numbers are achieved by, with and through people.

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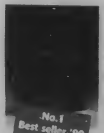

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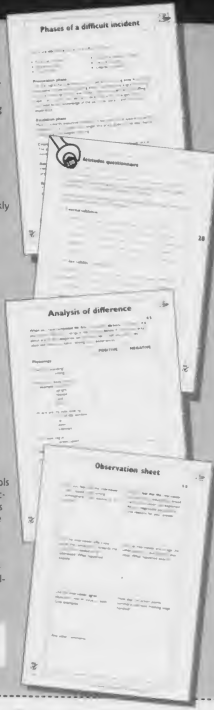

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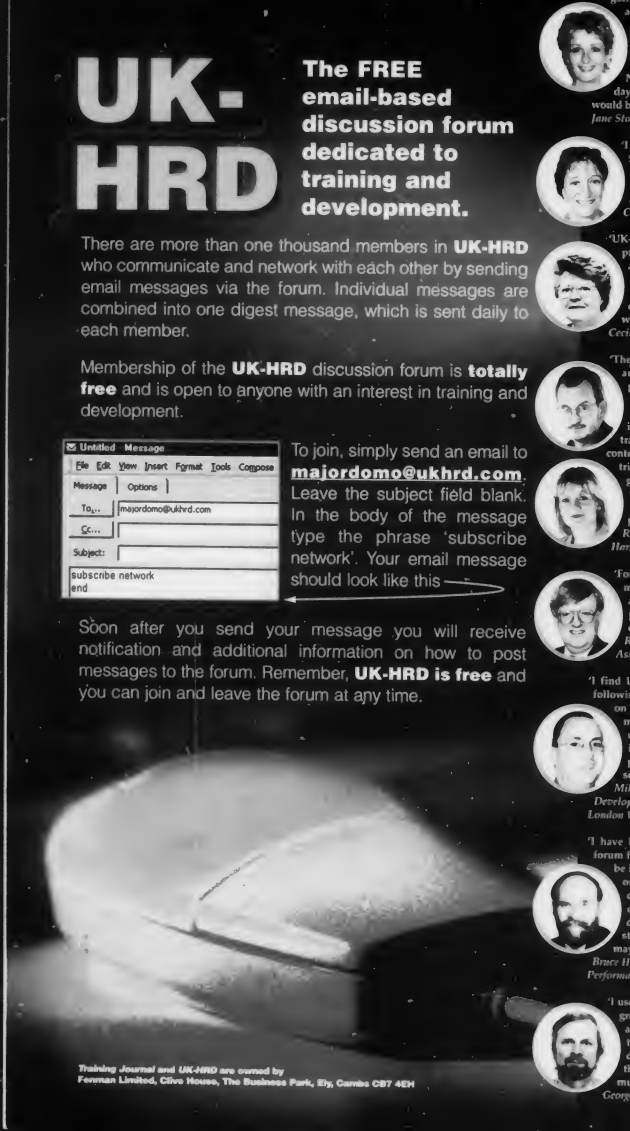

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